Servicing Mortgagee Scheduling & Bulk Upload
Quick Reference Guide Version 1.0

Physical Assessment Subsystem (PASS)
Release 2.6

U.S. Department of Housing and Urban Development
Real Estate Assessment Center (REAC)

March 30, 2001

Table of Contents

Introduction

The Real Estate Assessment Center (REAC) is a U.S. Department of Housing and Urban Development (HUD) national management center created to centralize and standardize the way HUD monitors and evaluates the physical condition, as well as the financial condition of HUD properties. This includes over 3,000 Public Housing Agencies (PHA) and over 30,000 Federal Housing Administration (FHA) multifamily insured, direct loan, HUD-held, and Section 8 project-based subsidized properties.

The Physical Assessment Subsystem (PASS) is a Web-based subsystem developed by REAC to monitor the physical condition of HUD properties based on on-site physical inspections. One component of PASS is Scheduling where inspection schedules are managed.

Objectives

The purpose of PASS Servicing Mortgagee Scheduling is to provide Servicing Mortgagees with a tool to effectively manage physical inspection scheduling details.

Servicing Mortgagees have access to property and scheduling information within their own organization. Servicing Mortgagees can search for inspection schedules, based on specified criteria (e.g., city, dates, etc.), and can modify basic property information. As a Servicing Mortgagee, you will select HUD REAC certified inspectors to work for your organization. From those inspectors you can select one or more to be Master Schedulers for your organization. The Master Scheduler is responsible for scheduling your organization's inspections to Independent Inspectors. Not all of your properties have to be scheduled by your Master Scheduler. The Servicing Mortgagee can schedule inspections as well.

The Servicing Mortgagee can download information (inspection schedule information), edit and update information directly to REAC's database using the Bulk Upload Process.

Accessing Servicing Mortgagee Scheduling

Security

PASS Servicing Mortgagee Scheduling is a secure, Web-based system containing sensitive public housing information. A HUD-issued user ID is required to access the system. Authorized users only have access to inspection scheduling information for properties associated with their FHA number.

Authorized users for PASS Servicing Mortgagee Scheduling includes:
* Servicing Mortgagees
* HUD REAC certified inspectors responsible for scheduling inspections (Master Schedulers), and conducting on-site physical inspections (Independent Inspectors) at HUD properties
* HUD REAC personnel responsible for monitoring HUD properties
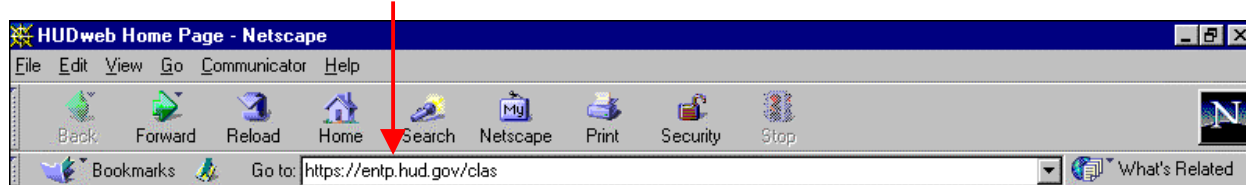
Authorized User Login

To access PASS Servicing Mortgagee Scheduling, a user must log in using their six-character HUD-issued user ID (e.g., M11111).

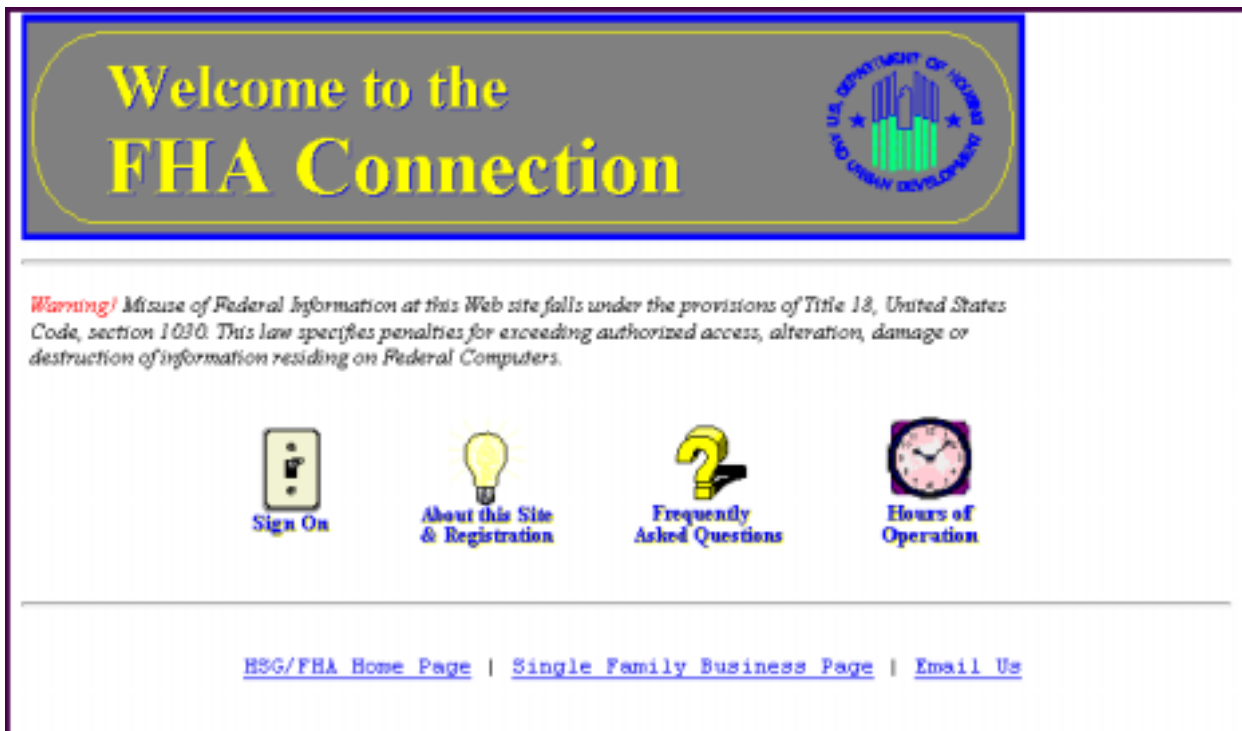### To access PASS Servicing Mortgagee Scheduling:

1. Open the Internet browser (e.g., Netscape). The example shown is the **Yahoo** main screen.
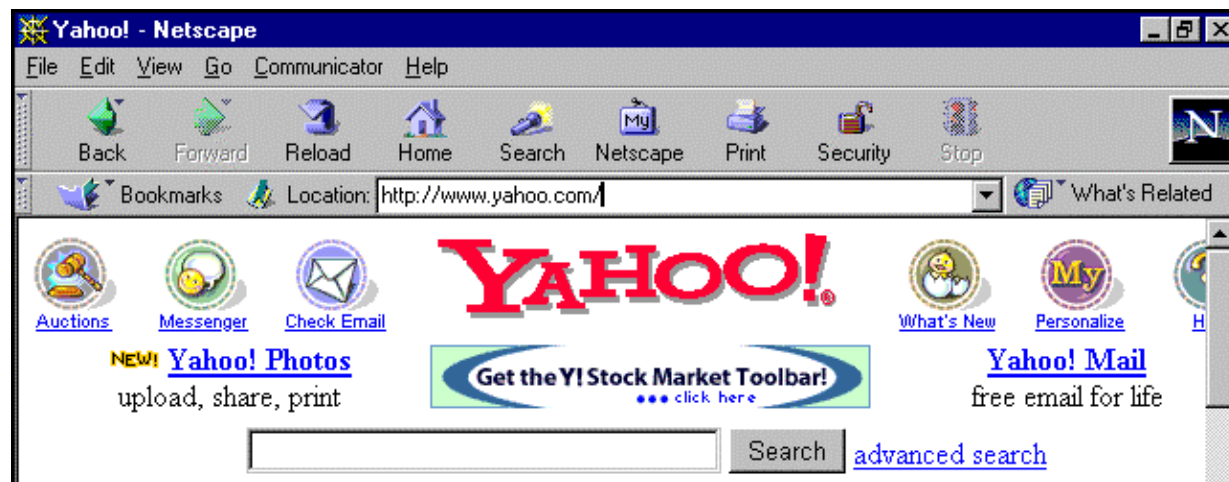
2. Enter the following URL address in the *Location* field: **https://entp.hud.gov/clas**

The **Welcome to the FHA Connection** screen displays.

3. Click on the **Sign On** icon. The **Username and Password Required** window displays.

4. Enter your user ID (e.g., M11111) in the *User Name* field. The user ID is case-sensitive; remember to use a capital letter when entering the user ID.

5. Tab to the *Password* field and enter your password. The password is also case-sensitive; enter the password exactly as you entered it on the registration application.

6. Click on the ⬚ OK ⬚ button. The **FHA Connection** screen displays.

7. Click on the Multi Family FHA link. The **Multifamily FHA** screen displays.

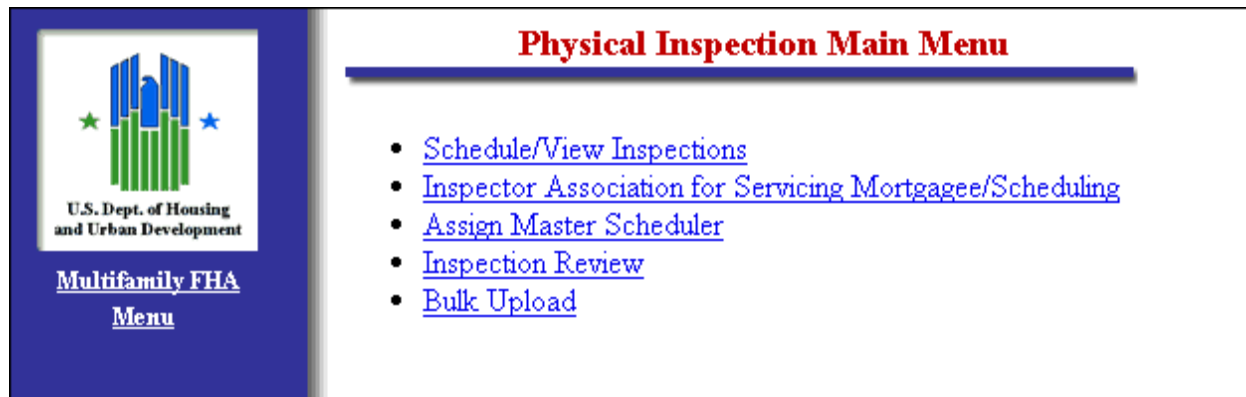8. Click on the <u>Physical Assessment Subsystem</u> link. The **Username and Password Required** window displays.
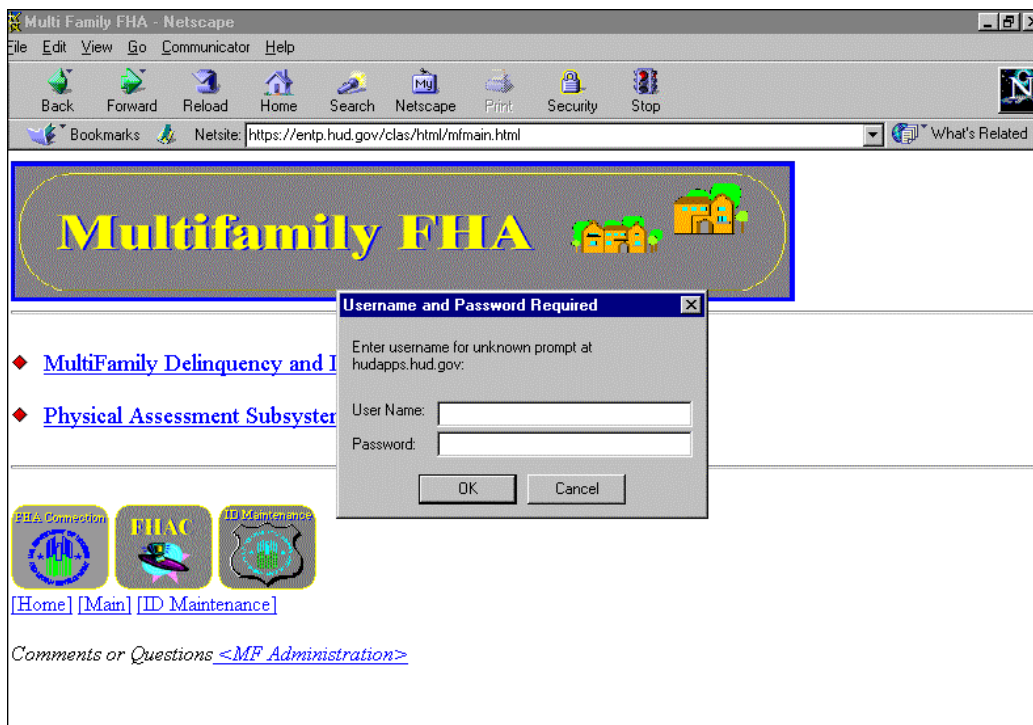
9. Enter your user ID in the *User Name* field. Enter your password and click on the [OK] button. The **Physical Inspection Main Menu** displays.

As a Servicing Mortgagee, there are five functions available. Each of these functions is addressed separately in this guide, with the exception of Inspection Review. The user guide, *Inspection Review Quick Reference Guide for Servicing Mortgagees* detailing this function is available.

Inspector Association for Servicing Mortgagee/Scheduling

Inspector Association for Servicing Mortgagee Screen

The **Inspector Association for Servicing Mortgagee** screen allows the Servicing Mortgagee to select certified REAC inspectors to work for their organization. From this screen, Servicing Mortgagees can also remove a selected inspector from their roster of inspectors.
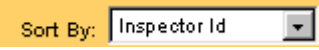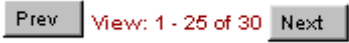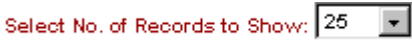
Inspector Association for Servicing Mortgagee

Feature	Description
Sort By: Inspector Id	This drop-down menu allows the Servicing Mortgagee to sort the inspector list in different ways: by inspector ID, inspector name, home state, and home city. Sorting saves time when searching for a specific inspector.
Prev View: 1 - 25 of 30 Next	These buttons allow Servicing Mortgagees to view information on the previous screen or next screen. In this example, there are 25 records on the current screen. To display the remaining 5 records click on the Next button. Once records 26-30 are displayed, click on the Prev button to return to records 1-25.
Select No. of Records to Show: 25	Sets the number of records displayed at one time. The system automatically displays 25 records at a time. Records display in increments of 25, 50, 75, 100, 200 or 250 on a screen.
Page No: 1	The list of inspectors can be noted on more than one page. To view another page, select a different page number from the drop-down list. For example, if viewing page 5 of 10 pages, and the Servicing Mortgagee selects page 8 from the drop-down list, page 8 displays.
☐ Show only selected	After selecting inspectors, the Servicing Mortgagee uses this checkbox to display only those inspectors working for the organization. If there are a total of 25 inspectors to select from and only 2 inspectors are selected when the checkbox is selected, then the screen redisplays with only those 2 inspectors.
Add ☐ ☐ ☐ ☐	When a Servicing Mortgagee wants a particular inspector to work for their organization they click in the checkbox for that inspector under the *Add* column. The system places a checkmark in the appropriate checkbox for the selected inspector(s). The Servicing Mortgagee selects all of their inspectors and then submits. The selected inspectors are then assigned to work for their organization.

Inspector Association for Servicing Mortgagee

Feature	Description
Remove ☒ ☒ ☒ ☒	When a Servicing Mortgagee wants to remove a particular inspector from their organization they click in the checkbox for that inspector, under the *Remove* column. The system places an **X** in the checkbox for the selected inspector(s). The Servicing Mortgagee submits and then the selected inspector(s) are no longer assigned to work for their organization.
Submit	This button either adds or removes an inspector(s) from the Servicing Mortgagee's list.
Reset	This button returns all fields to the original information.
Physical Inspection Main Menu	Physical Inspection Main Menu link returns the Servicing Mortgagee to the **Physical Inspection Main Menu** screen where other PASS components can be accessed.
Schedule/View Inspections	The Schedule/View Inspections link takes the Servicing Mortgagee to the **Schedule/View Inspections or Portfolio** screen.

To access the Inspector Association for Servicing Mortgagee/Scheduling screen:

Click on the Inspector Association for Servicing Mortgagee/Scheduling link on the **Physical Inspection Main Menu** screen.

Physical Inspection Main Menu

U.S. Dept. of Housing and Urban Development

Multifamily FHA Menu

- Schedule/View Inspections
- Inspector Association for Servicing Mortgagee/Scheduling
- Assign Master Scheduler
- Inspection Review
- Bulk Upload

The **Inspector Association For Servicing Mortgagee** screen displays.

To Add an Inspector(s) to the Organization's List of Inspectors:

1. Review the list of inspectors, and click on the appropriate checkbox under the *Add* column for the inspector(s) to be designated to work for the organization. A black checkmark appears in the checkbox.

Inspector Id	Inspector Name	Home State	Home City	Add	Remove
M00519	Ling Charles	VA	Mclean	☑	☒

2. Click the Submit button once all of the inspectors are selected on this screen. The screen redisplays with a red checkmark in the box under the *Add* column for each inspector selected. The selected inspectors are now assigned to work for the organization.

To Remove an Inspector from the Organization's List of Inspectors:

1. Review the list of inspectors, and click on the checkbox under the *Remove* column for the inspector(s) you wish to remove from the organization's list of inspectors. A black checkmark "✔" appears in the checkbox.

Inspector Id	Inspector Name	Home State	Home City	Add	Remove
M00519	Ling Charles	VA	Mclean	☑	☑

2. Scroll to the bottom of the screen, and click the Submit button once the inspector(s) to be removed have been designated. The screen redisplays with a red **X** in the checkbox under the *Remove* column for each inspector selected. Those inspectors are no longer included on the organization's list of inspectors.

Submit	Reset

To Display a List of Selected Inspectors to Work for the Organization:

1. Scroll to the middle of the screen and click on the box next to the field. ☐ Show only selected

The screen redisplays showing only those inspectors selected to work for the organization.

2. Assign one or more of the inspectors the Master Scheduler responsibility, once the selected inspectors are designated to work for the organization. By assigning this responsibility, they are authorized to schedule inspections for themselves and to other selected inspector(s) on behalf of the organization.

Assign Master Scheduler

Assign Master Scheduler Query Screen

The **Assign Master Scheduler** query screen is used by the Servicing Mortgagee to assign an inspector as a Master Scheduler for all or specific properties. As a Master Scheduler, this person is responsible for scheduling inspections for those properties assigned to them.

Once a property has been assigned to a Master Scheduler, the Servicing Mortgagee can use this screen to change the Master Scheduler of an assigned property.

The **Assign Master Scheduler** query screen allows Servicing Mortgagees to search for specific inspections that:

- Need to be assigned to a Master Scheduler
- Are already assigned to a Master Scheduler

The system automatically displays under the *View* section, the option of *View Unassigned Inspections* as being selected.

Searches can be narrowed in scope by entering specified criteria such as City, State, Zip Code, Ideal Future Inspection Date, Inspection Numbers, FHA Number, and Property IDs.

<table>
<tr><td colspan="2" align="center">

Assign Master Scheduler

</td></tr>
<tr><td align="center">**Feature**</td><td align="center">**Description**</td></tr>
<tr>
<td>⦿ View Unassigned Inspections</td>
<td>This radio button displays all inspections that have not been assigned to a Master Scheduler. This view option is used when the Servicing Mortgagee wants to assign a Master Scheduler.</td>
</tr>
<tr>
<td>○ View Assigned Inspections</td>
<td>This radio button displays all inspections that are assigned to a Master Scheduler. This view option is used when the Servicing Mortgagee wants to reassign a property to another Master Scheduler.</td>
</tr>
<tr>
<td>Select Master Scheduler</td>
<td>The Select Master Scheduler link prompts a pop-up window. The window displays all the inspectors selected by the Servicing Mortgagee to work for the organization.

Clicking on a specific Inspector ID link on the pop-up window closes the window and places the inspector ID in the field next to Select Master Scheduler.</td>
</tr>
<tr>
<td>Submit</td>
<td>Button initiates the action to locate inspection information based on information entered for the query.</td>
</tr>
<tr>
<td>Reset</td>
<td>Button returns all fields to the original information.</td>
</tr>
<tr>
<td>Physical Inspection Main Menu</td>
<td>Physical Inspection Main Menu link returns the Servicing Mortgagee to the **Physical Inspection Main Menu** screen where other PASS components can be accessed.</td>
</tr>
</table>

To access the Assign Master Scheduler screen:

Click on the Assign Master Scheduler link on the **Physical Inspection Main Menu** screen.

The **Assign Master Scheduler** query screen displays.

Query Fields

The query fields in the Selection Criteria section are optional. To execute a search, Servicing Mortgagees enter data in all, some, or leave the fields blank to generate a search for inspections.

- The *City* field allows Servicing Mortgagees to search for inspections by a particular city.

- The *State* field allows Servicing Mortgagees to search for inspections by states and territories.

    NOTE: To select more than one state or territory, hold down the CTRL key while selecting the states.

- The *Zip Code* field allows Servicing Mortgagees to search for inspections by zip code.

- The *Ideal Future Inspection Date* allows Servicing Mortgagees to search for inspections within a range of dates selecting the *Begin* and *End* dates of the time frame, and clicking on the calendar icon.

To use the calendar box:

1. Click on the calendar ⬚ icon to view the current month in the calendar box. The current date is highlighted.

2. Select a date by:

   - Click on a date (e.g., <u>17</u>) to select a date in the current month.

   - To move backward or forward by year, click once on the symbols (**I<** or **>I)** per year.

   - To move backward or forward by month, click once on the symbols (**<** or **>**) per month.

   - Servicing Mortgagees can also use the drop-down arrows to select the month and year from the Month and Year menus. The calendar changes once the month and year are selected, then the Servicing Mortgagees click on a specific date within the month.

The calendar box closes once a date is selected, or click on the Close control **X** icon to close the window.

> **NOTE:** If a date is only entered in the *Begin* field, the query results will list all ideal future inspection dates equal to or greater than the ideal future inspection date entered.
>
> If a date is only entered in the *End* field, the query results will list all ideal future inspection dates equal to or less than the ideal future inspection date entered.
>
> To generate a search for one ideal future inspection date, enter the same date in the *Begin* and *End* fields.

- The ***Inspection Number*** field allows the Servicing Mortgagee to search for inspections by a specific inspection number or a range of inspection numbers

> **NOTE:** If the inspection number is only entered in the *From* field, the query results will list all inspection numbers equal to or greater than the inspection number entered.
>
> If the inspection number is only entered in the *To* field, the query results will list all inspection numbers equal to or less than the inspection number entered.
>
> To generate a search for one inspection number, enter the inspection number in the *To* and *From* fields.

- The ***FHA Number*** field allows the Servicing Mortgagee to search for inspections by a specific FHA number.

- The *Property ID* field allows Servicing Mortgagees to search for inspections by a specific property ID or for a range of property IDs by entering the property ID number(s).

    NOTE: If the Property ID number is only entered in the From field, the query results will list all property ID numbers equal to or greater than the property ID number entered.

    If the Property ID number is only entered in the To field, the query results will list all property ID numbers equal to or less than the property ID number entered.

    To generate a search for one property, enter the property ID number in the To and From fields.

Assign Master Scheduler (Unassigned/Assigned Inspections)

Once the **Assign Master Scheduler** query screen is updated and submitted, the **Assign Master Scheduler (Unassigned or Assigned Inspections)** screen displays which contains basic information on the inspections, and the Servicing Mortgagee can assign a Master Scheduler to one or more of the inspections.

Once the Master Scheduler is assigned to an inspection, they are responsible for scheduling the inspection.

<div align="center">

Assign Master Scheduler

Unassigned Inspections

5 Record(s) Found

SEARCH CRITERIA: UnS

</div>

You can either enter the Master Scheduler Id into each entry field in the grid, in the following entry box and check all records on the grid that you want to put this ID in, or you can simply enter the Master Scheduler ID in the following entry box and check and click " Apply All"
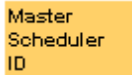
Select Master Scheduler [   ]   [Apply All]
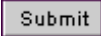
[Prev] View: 1 - 5 of 5 [Next] Select No. of Records to Show: [25 ▼] Page No: [1 ▼]

	FHA No	Property ID	Property Name	City	State	Insp. No.	Insp. Date	Master Scheduler ID	Last (Released) Insp.Date	Prior Score	Ideal Future Insp. Date
☐	08976745	53668	Lake View	Vienna	VA	22103		[ ]	03/29/2000	67a*	03/28/2003
☐	35567221	800045632	Fair Homes	Washington	DC	2009		[ ]	04/17/2000	91c*	04/17/2003
☐	08437383	800066666	Skyline	McLean	NY	2000		[ ]	10/21/1999	79c*	10/21/2000
☐	08437444	800076767	Charles Smith	Falls Church	NY	2002		[ ]	09/21/1999	67a*	10/14/2000
☐	08375383	800806081	Hilltop Apartments	Louisville	KY	2010		[ ]	10/21/1999	79c*	10/21/2000

<div align="center">

[Submit] [Reset]
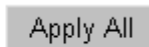
Assign Master Scheduler
Physical Inspection Main Menu

</div>

> **NOTE:**   Use the scroll bar to view all the columns, if necessary.

Assign Master Scheduler

Feature	Description
Select Master Scheduler [ ]	Enter the Inspector's ID number in the blank field. If the inspection ID is not known click on the Select Master Scheduler link. This link prompts a pop-up window that displays all the inspectors selected by the Servicing Mortgagee to work for the organization. Clicking on a specific Inspector ID link on the pop-up window closes the window and places the inspector ID in the field next to Select Master Scheduler.
[ ] Apply All	Once an Inspector ID number appears in the *Select Master Scheduler* field, click the Apply All button and all the inspections have the Master Scheduler's ID field updated with that inspector's ID number.
Prev View: 1 - 25 of 30 Next	These buttons allow Servicing Mortgagees to view information on the previous screen or next screen. In this example, there are 25 records on the current screen. To display the remaining 5 records click on the Next button. Once records 26-30 display, click on the Prev button to return to records 1-25.
Select No. of Records to Show: 25 ▼	Sets the number of records displayed at one time. The system automatically displays 25 records at a time. Records display in increments of 25, 50, 75, 100, 200 or 250 on a screen.
Page No: 1 ▼	The list of unassigned or assigned inspections can be listed on more than one page. To view another page, select a different page number from the drop-down list. For example, if viewing page 5 of 10, and the Servicing Mortgagee selects page 8 from the drop-down list, page 8 displays.
☐	When a checkbox is selected, the Inspector ID located in the Select Master Scheduler field automatically updates the *Master Scheduler ID* field for the row selected.
FHA No and Property ID links	Both links allow the Servicing Mortgagee to view or update the **Property Information** screen for a particular property.
Master Scheduler ID	The ID number of the inspector assigned as the Master Scheduler. The field can be updated by the system using the checkbox or the Apply All button, or by manually entering the inspector ID number of the Master Scheduler.

<table>
<tr><td colspan="2" align="center">

Assign Master Scheduler

</td></tr>
<tr><th>Feature</th><th>Description</th></tr>
<tr>
<td align="center">Submit</td>
<td>Button either assigns or reassigns a Master Scheduler to a property.</td>
</tr>
<tr>
<td align="center">Reset</td>
<td>This button returns all fields to the original information.</td>
</tr>
<tr>
<td align="center">Assign Master Scheduler</td>
<td>Assign Master Scheduler link returns the Servicing Mortgagee to the **Assign Master Scheduler** query screen.</td>
</tr>
<tr>
<td align="center">Physical Inspection Main Menu</td>
<td>The Physical Inspection Main Menu link returns the Servicing Mortgagee to the **Physical Inspection Main Menu** screen where other PASS components can be accessed.</td>
</tr>
</table>

To assign a Master Scheduler to an inspection:

1. Enter the Inspector ID number (if known) in the blank field.

Select Master Scheduler   [   ]   Apply All

OR

Click on the Select Master Scheduler link if the Inspector ID number is not available. The **Inspector List** displays with a list of selected inspectors.

Inspector List   Sort By: Inspector Id

Prev | View: 1 - 2 of 2 | Next | Select No. of Records to Show: 25 | Page No: 1

Inspector Id	Inspector Name	Home State	Home City
M00519	Ling Charles	VA	McLean
M00884	Robert Red	VA	Falls Church

Inspector Id
M00519

2. Click on an Inspector ID link (e.g., M00519) _____ . The **Inspector List** closes and the Inspector ID number displays in the field next to the Apply All button.

3. Click on the checkbox next to the *FHA Number* column. The *Master Scheduler ID* field is updated with the Inspector ID (next page).

Select Master Scheduler [M00519] [Apply All]

Prev | View: 1 - 5 of 5 Next | Select No. of Records to Show: [25 ▼] Page No: [1 ▼]

	FHA No	Property ID	Property Name	City	State	Insp. No.	Insp. Date	Master Scheduler ID	Last (Released) Insp.Date	Prior Score	Ideal Future Insp. Date
☐	08976745	53668	Lake View	Vienna	VA	22103		[ ]	03/29/2000	67a*	03/28/2003
☐	35567221	800045632	Fair Homes	Washington	DC	2009		[ ]	04/17/2000	91c*	04/17/2003
☑	08437383	800066666	Skyline	McLean	NY	2000		[M00519]	10/21/1999	79c*	10/21/2000
☑	08437444	800076767	Charles Smith	Falls Church	NY	2002		[M00519]	09/21/1999	67a*	10/14/2000
☐	08375383	800806081	Hilltop Apartments	Louisville	KY	2010		[ ]	10/21/1999	79c*	10/21/2000

> **NOTE:** If you want to assign all properties to one Master Scheduler, click on the Apply All button and the *Master Scheduler ID* field for each inspection is updated with the Inspector ID number of the Master Scheduler.

4. Click on the Submit button. The screen redisplays and the assigned properties no longer appear on this screen. The assigned properties now appear on the screen for **Assigned Inspections**.
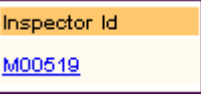
To change a Master Scheduler of an inspection:

1. Enter the Inspector ID number (if known) in the blank field. ──────────

Select Master Scheduler [←] [Apply All]

OR

Click on the Select Master Scheduler link if the Inspector ID is not available. The **Inspector List** displays with a list of selected inspectors.

Inspector List   Sort By: [Inspector Id ▼]

Prev | View: 1 - 2 of 2 Next | Select No. of Records to Show: [25 ▼] Page No: [1 ▼]

Inspector Id	Inspector Name	Home State	Home City
M00519	Ling Charles	VA	McLean
M00884	Robert Red	VA	Falls Church

2. Click on an Inspector ID link (e.g., M00519) on the **Inspector List**. The **Inspector List** closes and the Inspector ID number displays in the field next to the Apply All button.

3. Click on the checkbox next to the *FHA Number* column of the inspection to update the Master Scheduler field. The *Master Scheduler ID* field is updated with the new Inspector ID number.

> **NOTE:** If the Servicing Mortgagee wants to reassign all their inspections to one Master Scheduler, click on the Apply All button and the *Master Scheduler ID* field for each inspection is updated with the Inspector ID number of the Master Scheduler.

4. Click on the Submit button. The screen redisplays and the inspections are reassigned.

If all of the inspections are not assigned to a Master Scheduler, the Servicing Mortgagee can schedule those inspections. Any inspection scheduled by the Master Scheduler can also be viewed and updated by the Servicing Mortgagee.

To View Property Information, Inspection Summary Reports or Investor Reports from the Assign Master Scheduler (Assigned/Unassigned Inspections) Screen:

Click on the *FHA No* or *Property ID* link on the **Assign Master Scheduler** screen to review and update the **Property Information** screen, or to view prior **Inspection Summary Reports** and **Investor Reports**. The SKYLINE (800066666) property is shown below.

Servicing Mortgagees can edit all fields on this screen to update the property information.

       a.   Click in the appropriate field and enter new or revised data.

       b.   Click on the [Update Profile] button to save the property information in the database. A message screen displays confirming the update.

       c.   Click on the <u>Back to Search Page</u> link to return the **Schedule/View Inspections or Portfolio** screen or click on the <u>Physical Inspection Main Menu</u> link to return to the **Physical Inspection Main Menu** screen.

Servicing Mortgagees can access prior Inspection Summary Reports or Investor Reports from the Property Information screen.

       a.   Click on the <u>Prior Inspection Data</u> link located at the top of the **Property Information** screen.

The **Prior Inspection Information** screen displays.

SKYLINE

(FHA NO: 08437383 Property ID: 800066666)

Prior Inspection Information						
Property Information				Prior Inspection Data		
Insp. No.	**Insp. Date**	**Insp. ID**	**Insp. Name**	**Score**	**Inspection Report**	**Investor Report**
1536	02/14/2000	M56342	Murthy Krishna	71b	View Report	View Report
1202	09/01/1999	M00002	Steven Martino	74b	View Report	View Report

Physical Inspection Main Menu

b. Click on the <u>View Report</u> link of the property to be reviewed, and the Inspection Summary Report displays in a PDF format. (See Appendix A for an example of an Inspection Summary Report)

OR

c. Click on the <u>View Report</u> link of the property to be reviewed, and the Investors Report displays in a PDF format. (See Appendix B for an example of the Investor Report)

To close the PDF:

Click File on the Menu bar and select Exit to close the PDF and return to the **Prior Inspection Information** screen.

d. Click on the Property Information link to return to the **Property Information** screen, or click on the Physical Inspection Main Menu link return to **Physical Inspection Main Menu** screen and continue working.

Schedule/View Inspections or Portfolio

Schedule/View Inspections or Portfolio Query Screen

The **Schedule/View Inspections or Portfolio** query screen allows Servicing Mortgagees to search for specific inspection assignments. Servicing Mortgagees can request to update inspection schedules, view inspection reports and the portfolio (property listing) or create text reports using this screen. Searches can be narrowed by entering specified criteria such as *City, State, Zip Code, Inspection Schedule Date Range, Scoring Range, Master Scheduler ID, Inspector ID, Ideal Future Inspection Date, Inspection Number(s), Property ID(s), FHA Number* and *Uninspectable Code.*

Schedule/View Inspections or Portfolio

Feature	Description
⊙ Schedule Inspection	This function allows the Servicing Mortgagee to schedule or reschedule inspections.
⊙ View Web Page Report	This function allows the Servicing Mortgagee to view **Inspection Schedule Reports** for scheduled inspections, unscheduled inspections, or both scheduled and unscheduled inspections.
⊙ Create Text Report	This function allows Servicing Mortgagees to download and update a large volume of data (e.g., inspection schedule, inspection property and inspection participant information) using other applications, such as Microsoft Word. After the data is sent to REAC via the Bulk Upload Process.
⊙ View All Inspections	This view option allows the Servicing Mortgagee to view both scheduled and unscheduled inspections.
⊙ View Unscheduled Inspections	This view option allows the Servicing Mortgagee to view unscheduled inspections.
⊙ View Scheduled Inspections	This view option allows the Servicing Mortgagee to view scheduled inspections.
⊙ View Portfolio Selection Criteria	This button prompts the **Portfolio** query screen.
Select Master Scheduler	The Select Master Scheduler link prompts a pop-up window. The window displays all the inspectors selected by the Servicing Mortgagee to work for the organization. Selecting a specific Inspector ID link on the pop-up window closes the window and places the inspector ID in the *Master Scheduler ID* field.
Select Inspector	The Select Inspector link prompts a pop-up window. The window displays all the inspectors selected by Servicing Mortgagee to work for the organization. Selecting a specific Inspector ID link on the pop-up window closes the window and places the inspector ID in the *Inspector ID* field.
Submit	This button initiates the action to locate schedule information based on information entered for the query.
Reset	This button returns all fields to the original information.

Schedule/View Inspections or Portfolio

Feature	Description
Physical Inspection Main Menu	Physical Inspection Main Menu link returns the Servicing Mortgagee to the **Physical Inspection Main Menu** screen where other PASS components can be accessed.

To access the Schedule/View Inspections or Portfolio query screen:

Click Schedule/View Inspections link on the **Physical Inspection Main Menu** screen.
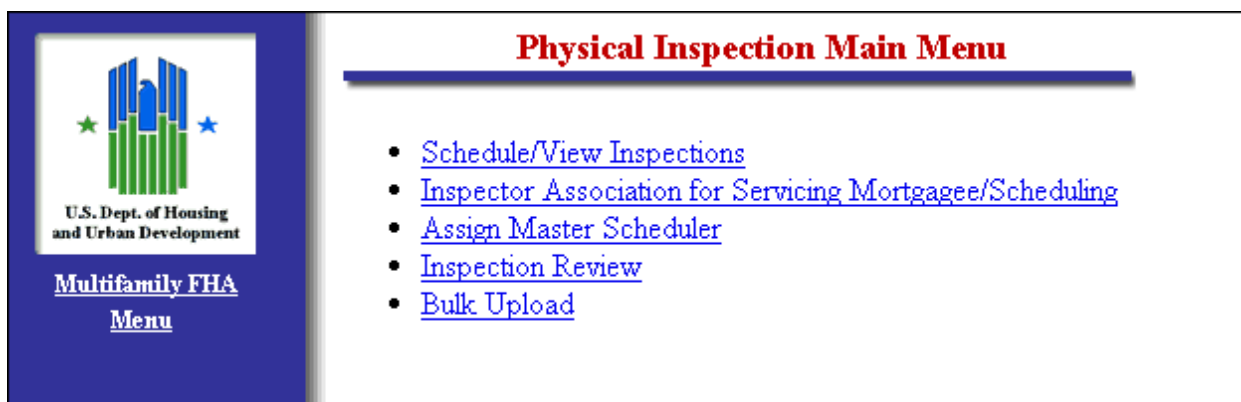
The **Schedule/View Inspections or Portfolio** query screen displays. (next page)

Query Fields

The query fields in the *Function* and *View* sections of the **Schedule/View Inspection or Portfolio** query screen are required. Servicing Mortgagees must select one option in each section. The system automatically displays as the default, Schedule Inspection in the *Function* section and View All Inspections in the *View* section of the screen.

All of the query fields in the Selection Criteria section are optional. To execute a search Servicing Mortgagees can complete all, some, or leave the fields blank. The more information provided in the query search reduces the number of unnecessary results. For example, if 100 inspections need to be scheduled, and specific information is not specified about those inspections, the **Inspections Schedule Report** displays all 100 inspections once submitted. However, if a Servicing Mortgagee only wants to view inspections for the state of Virginia, then select Virginia in the *State* field and the **Inspections Schedule Report** displays only those inspections in Virginia.

- The *Function* section determines what Servicing Mortgagees can do with the inspection information by clicking on one of the appropriate radio buttons. Servicing Mortgagees have three options:

  – *Schedule Inspection* allows Servicing Mortgagees to enter or modify schedule information on the **Inspections Schedule Report**.

  – *View Web Screen Report* allows Servicing Mortgagees to view or print the **Inspections Schedule Report**.

  – *Create Text Report* allows Servicing Mortgagees to download inspection schedule, inspection property, inspection participant and participant role reference information to update and revise on their own computer using Microsoft Word.

- The *View* section allows Servicing Mortgagees to search for scheduled, unscheduled, or all inspections (scheduled and unscheduled) by clicking on the appropriate radio button. In addition Servicing Mortgagees can view property portfolio information by clicking on the view option; *View Portfolio Selection Criteria*.

- The *City* field allows Servicing Mortgagees to search for inspections by a particular city.

- The *State* field allows Servicing Mortgagees to search for inspections by states and territories.

  NOTE: To select more than one state or territory, hold down the CTRL key while selecting the states.
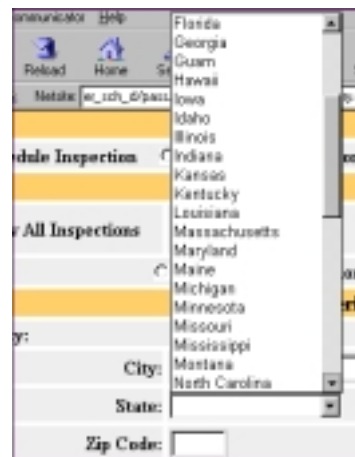
- The *Zip Code* field allows Servicing Mortgagees to search for inspections by zip code.

- The *Inspection Schedule Date Range* allows the Servicing Mortgagee to perform a search on inspection schedules within a range of dates, selecting the *Begin* and *End* dates of the time frame by clicking on the calendar icon.

To use the calendar box:

1. Click on the calendar ▦ icon to view the current month in the calendar box. The current date is highlighted.

2. Select a date by:

   - Click on a date (e.g., 20) to select a date in the current month.

   - To move backward or forward by year, click once on the symbols (**l<** or **>l)** per year.

   - To move backward or forward by month, click once on the symbols (**<** or **>)** per month.

   - Servicing Mortgagees can also use the drop-down arrows to select the month and year from the Month and Year menus. The calendar changes once the month and year are selected, then the Servicing Mortgagees click on a specific date within the month.

The calendar box closes once a date is selected, or click on the Close control **X** icon to close the window.

   NOTE: If a date is only entered in the *Begin* field, the query results will list all inspection schedule date ranges equal to or greater than the inspection schedule date entered.

   If a date is only entered in the *End* field, the query results will list all inspection schedule date ranges equal to or less than the inspection schedule date entered.

   To generate a search for one inspection schedule date range, enter the same date in the *Begin* and *End* fields.

- The ***Scoring Range*** field allows Servicing Mortgagees to search for inspections by score(s) of the last released inspection.

   NOTE: If a score is only entered in the *From* field, the query results will list all scores equal to or greater than the score entered.

   If a score is only entered in the *To* field, the query results will list all scores equal to or less than the score entered.

   To generate a search for one score, enter the same score in the *From* and *To* fields.

- The *Master Scheduler ID* field allows Servicing Mortgagees to search for inspections by using the Master Scheduler's ID number. Enter the Inspector ID number in the *Master Scheduler ID* field. Servicing Mortgagees can also click on the Select Master Scheduler link to view a list of all Inspector ID numbers that have been selected to work for the organization. Click on the Inspector ID link to select a Master Scheduler Inspector. The **Schedule/View Inspections or Portfolio** screen redisplays once an Inspector ID is selected from the **Inspector List**.

> **NOTE:** The **Inspector List** contains the Inspector ID numbers of both, Master Schedulers and Independent Inspectors selected to work for the organization. There is no special listing that displays *only* Master Scheduler ID or Independent Inspector ID numbers.

- The *Inspector ID* field allows Servicing Mortgagees to search for inspections by the Inspector 's ID number. Enter the Inspector ID number in the *Inspector ID* field. Servicing Mortgagees can also click on the Select Inspector link to view a list of all Inspector ID numbers that have been selected to work for the organization. Click on the Inspector ID link to select an Inspector ID, or leave this field blank. The **Schedule/View Inspections or Portfolio** screen displays once an *Inspector ID* is selected from the **Inspector List**.

> **NOTE:** The **Inspector List** contains the Inspector ID numbers of both, Master Schedulers and Independent Inspectors selected to work for the organization. There is no special listing that displays *only* Master Scheduler ID or Independent Inspector ID numbers.

- The *Ideal Future Inspection Date* allows Servicing Mortgagees to search for inspection schedules with the ideal future inspection date, selecting the *Begin* and *End* dates of the time frame by clicking on the calendar [icon] icon.

To use the calendar box:

1. Click on the calendar [icon] icon to view the current month in the calendar box. The current date is highlighted.

2. Select a date by:

   - Click on a date (e.g., 20) to select a date in the current month.

   - To move backward or forward by year, click once on the symbols (**I<** or **>I)** per year.

   - To move backward or forward by month, click once on the symbols (**<** or **>**) per month.

   - Servicing Mortgagees can also use the drop-down arrows to select the month and year from the Month and Year menus. The calendar changes once the month and year are selected, then the Servicing Mortgagees click on a specific date within the month.

The calendar box closes once a date is selected, or click on the Close control **X** icon to close the window.

> **NOTE:**   If a date is only entered in the *Begin* field, the query results will list all ideal future inspection dates equal to or greater than the ideal future inspection date entered.
>
> If a date is only entered in the *End* field, the query results will list all ideal future inspection dates equal to or less than the ideal future inspection date entered.
>
> To generate a search for one ideal future inspection date, enter the same date in the *Begin* and *End* fields.

- The *Inspection Number* field allows Servicing Mortgagees to search for a specific inspection or for a range of inspections.

  > **NOTE:** If the inspection number is only entered in the From field, the query results will list all inspection numbers equal to or greater than the inspection number entered.
  >
  > If the inspection number is only entered in the To field, the query results will list all inspection numbers equal to or less than the inspection number entered.
  >
  > To generate a search for one inspection number, enter the inspection number in the To and From fields.

- The *Property ID* field allows Servicing Mortgagees to search for inspections by a specific property ID or for a range of property IDs.

NOTE: If the Property ID number is only entered in the *From* field, the query results will list all property ID numbers equal to or greater than the property ID number entered.

If the Property ID number is only entered in the *To* field, the query results will list all property ID numbers equal to or less than the property ID number entered.

To generate a search for one property ID number, enter the property ID number in the *To* and *From* fields.

- The **FHA Number** field allows Servicing Mortgagees to search for inspections by a specific FHA number.

- The *Uninspectable Code* field allows the Servicing Mortgagee to search for inspections by an uninspectable code selected from the drop-down menu.

    IN   Property is inspectable (default)
    RU   Property is being reported as uninspectable (inspection can still be scheduled)

    The following codes` are only assigned by HUD:

    VI   Property has been verified by HUD as inspectable and
          is being referred back for inspection (inspection can still be scheduled)
    VU   Property has been verified as uninspectable (inspection cannot be scheduled).
          Inspections with the VU code cannot be downloaded to a Data Collection Device
          (DCD).

Once the *Function*, *View*, and *Selection Criteria* sections are selected, click on the [Submit] button, and one of the following screens or options displays:

— **Inspections Schedule Report** (to schedule/reschedule inspections) via the *Schedule Inspection* function

— **Inspections Schedule Report** (to view scheduled/unscheduled inspections) via the *View Web Screen Report* function

— **Text Reports** via the *Create Text Report* function

— **View Portfolio** query screen via the *View Portfolio Selection Criteria* view option

Inspections Schedule Report Screen

Once the **Schedule/View Inspections or Portfolio** query screen is updated and submitted, the **Inspections Schedule Report** displays which contains basic information on scheduled, unscheduled or both scheduled and unscheduled inspections based on specified criteria. The Servicing Mortgagee schedules or reschedules inspections to any inspector working for that organization.

Those inspectors working for the organization can view properties to which they have been assigned, and can modify their inspection schedules. To ensure the integrity of the data, any modifications to the inspection schedule or property information should be made prior to the download of the inspection.

Inspections Schedule Report

5 Record(s) Found
All Inspections
To schedule an Inspection, enter the Inspector's ID, Inspection Date and the Local Time.

You can either enter the Inspector Id into each entry field in the grid, in the following entry box and check all records on the grid that you want to put this ID in, or you can simply enter the Inspector ID in the following entry box and check and click "Apply All" to apply to all the records on this page only. You must click "Update" in order to send your changes to the database.

Select Inspector [____]   [Apply All]   [Prev] View: 1 - 5 of 5 [Next] Select No. of Records to Show: [25 ▼] Page No: [1 ▼]   [Search Page]

	FHA No	Property ID	Property Name	City	State	Insp. No.	Insp. Date	Local Time	Inspector ID	Last Released Insp.Date	Prior Score	Ideal Future Date	Uninsp. Code
☐	08976745	53668	Lake View	Vienna	VA	22103	[____]	[____▼]	[____]	03/29/2000	67a*	03/28/2003	IN
☐	35567221	800045632	Fair Homes	Washington	DC	2009	[____]	[____▼]	[____]	04/17/2000	91c*	04/17/2003	IN
☑	09437383	800066666	Skyline	McLean	NY	2000	Dec 12 2000	02:00 PM ▼	140009*	10/21/1999	79c*	10/21/2000	IN
☑	09437444	800076767	Charles Smith	Falls Church	NY	2002	Dec 19 2000	11:00 AM ▼	140009*	09/21/1999	67a*	10/14/2000	IN
☑	08375383	800806081	Hilltop Apartments	Louisville	KY	2010	Dec 15 2000	03:00 PM ▼	140009*	10/21/1999	79c*	10/21/2000	IN

[Update]   [Reset]

Back to Search Page

Physical Inspection Main Menu

NOTE: Use the scroll bar to view all the columns, if necessary.

Inspections Schedule Report

Feature	Description
Select Inspector [ ]	Enter the Inspector's ID number in the blank field. If the Inspector ID number is not known, click on the Select Inspector link. This prompts a pop-up window that displays all the inspectors selected by Servicing Mortgagee to work for the organization. Selecting a specific Inspector ID link on the pop-up window, closes the window and places the inspector ID in the field next to Select Inspector.
Prev View: 1 - 25 of 30 Next	These buttons allow Servicing Mortgagees to view information on the previous screen or next screen. In this example, there are 25 records on the current screen. To display the remaining 5 records click on the Next button. Once records 26-30 are displayed, click on the Prev button to return to records 1-25.
Select No. of Records to Show: 25	Sets the number of records displayed at one time. The system automatically displays 25 records at a time. Records display in increments of 25, 50, 75, 100, 200 or 250 on a screen.
Page No: 1	The list of scheduled or unscheduled inspections can be listed on more than one page. To view another page, select a different page number from the drop-down list For example, if viewing 5 of 10 pages and the Servicing Mortgagee selects page 8 from the drop-down list, page 8 displays.
Apply All	Once an Inspector ID number appears in the *Select Inspector* field, click on the Apply All button and all inspections have the *Inspector ID* field updated with that inspector's ID number.
Search Page	This button returns the Servicing Mortgagee to the **Schedule/View Inspections or Portfolio** query screen.
☐	When a checkbox is selected, the Inspector Number ID located in the Select Inspector field automatically updates the *Insp. ID* field for the row selected.
FHA No and Property ID links	Both links allow the Servicing Mortgagee to view or update the **Property Information** screen for a particular property. From the screen, Servicing Mortgagees can access prior **Inspection Summary Reports** or **Investor Reports**.

Inspections Schedule Report

Feature	Description
Insp. Date	Enter the date of the inspection using this format: MM/DD/YYYY (e.g., 02/23/2001).
Local Time	Inspections are scheduled based on the local time between the hours of 7 AM and 3 PM in half-hour increments.
Inspector ID	Enter the ID number of the inspector scheduled to conduct the inspection in this field. The field can be updated by the system using the checkbox, **Apply All** button, or by manually entering the inspector ID number.
Uninsp. Code	Provides the applicable code of an inspection if a property is determined to be uninspectable. The code is changed from IN to RU. A pop-up window displays and the Servicing Mortgagee updates the fields with the information that was provided rendering the property uninspectable. The codes are: **IN** Property is inspectable (default) **RU** Property is being reported as uninspectable **VI** Property has been verified by HUD as inspectable and is being referred back for inspection **VU** Property has been verified as uninspectable
Update	Button schedules or reschedules the inspection based on the information entered.
Reset	This button returns all fields to the original information.
Back to Search Page	This link returns the Servicing Mortgagee to the **Schedule/View Inspections or Portfolio** query screen.
Physical Inspection Main Menu	The Physical Inspection Main Menu link returns the Servicing Mortgagee to the **Physical Inspection Main Menu** screen where other PASS components can be accessed.

To schedule or reschedule an inspection schedule:

1. Click on the ⊙ **Schedule Inspection** radio button in the *Function* section to view the **Schedule/View Inspections or Portfolio** query screen.

2. Click on a view option in the *View* section of the screen.

   In this example, *View All Inspections* is selected.

3. Enter the search criteria in the appropriate fields, or leave these fields blank.

4. Click on the **Submit** button. The **Inspections Schedule Report** displays.

   NOTE: The complete table may not display on the screen. Use the scroll bars in the table to view all columns and rows.

The **Inspection Schedule Report** shows basic information for all inspections that match the specified search criteria.

- When the Servicing Mortgagee schedules an inspection the following **three fields must be updated**:

— *Insp. Date* (Inspection Date) - correct format for the *Insp. Date* field is MM/DD/YYYY

— *Local Time* - time of the inspection from 7 AM – 3 PM in half-hour increments

— *Inspector ID -* Inspector ID number

5. Click on the [Update] button. The **Inspection Scheduling Results** screen displays confirming that the update is accepted.

Inspection Scheduling Results

1 rows have been successfully changed.

Back to Inspections Schedule Report

Back to Search Page

Physical Inspection Main Menu
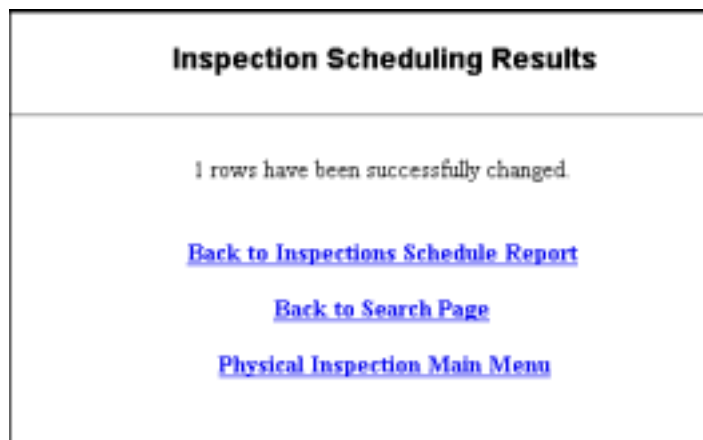
   NOTE: If an inspector is scheduled for more than two inspections on the same date, a warning message is displayed to inform the Servicing Mortgagee of the scheduling conflict. However the database is still updated with the scheduled inspection. The following is an example of this message:

www2.hud.gov - [JavaScript Application]

⚠ Inspector M11111 has 3 inspections scheduled on 06/02/2001.

OK

The **Uninspectable Property Details** screen must be updated if it is determined that the property is uninspectable.

1. Click on the <u>IN</u> code link in the *Uninsp Code* column.

The **Uninspectable Property Details** screen displays.

2. Update all of the fields (telephone extension is optional).

3.   Click on the Update button. The **Inspections Schedule Report** redisplays with the *Uninsp Code* field updated to RU.

To View Property Information, Inspection Summary Reports or Investor Reports from the Inspections Schedule Report:

Click on the *FHA No* or *Property ID* link on the **Inspections Schedule Report** to review and update the **Property Information** screen, or to view prior **Inspection Summary Reports** or **Investor Reports**. The SKYLINE (800066666) property is shown below.

Servicing Mortgagees can edit all fields on this screen to update the property information.

   a. Click in the appropriate field and enter new or revised data.

   b. Click on the [Update Profile] button to save the property information in the database. A message displays confirming the update.

c. Click on the <u>Back to Search Page</u> link to return the **Schedule/View Inspections or Portfolio** screen or click on the <u>Physical Inspection Main Menu</u> link to return to the **Physical Inspection Main Menu** screen.

Servicing Mortgagees can access prior Inspection Summary Reports or Investor Reports from the Property Information screen.

a. Click on the <u>Prior Inspection Data</u> link located at the top of the **Property Information** screen.

The **Prior Inspection Information** screen displays.

b. Click on the <u>View Report</u> link of the property to be reviewed, and the Inspection Summary Report displays in a PDF format. See Appendix A for an example of an **Inspection Summary Report**.

OR

c. Click on the <u>View Report</u> link of the property to be reviewed, and the Investors
    Report displays in a PDF format. See Appendix B for an example of the Investor
    Report.

To close the PDF:

Click File on the Menu bar and select Exit to close the PDF and return to the **Prior
Inspection Information** screen.

d. Click on the <u>Property Information</u> link to return to the **Property Information** screen,
    or click on the <u>Physical Inspection Main Menu</u> link return to **Physical Inspection
    Main Menu** screen and continue working.

View Web Screen Report Option

The **View Web Screen Report** option allows Servicing Mortgagees to view or print the **Inspections Schedule Report**. This is a view only screen and no inspections can be scheduled or rescheduled. Use the scroll bar to view all the columns, if necessary.

To view the Web Screen Report:

1. Click on the [○ View Web Page Report] radio button in the *Function* section of the **Schedule/View Inspections or Portfolio** screen.

Schedule/View Inspections or Portfolio

Function		
○ Schedule Inspection	● View Web Page Report	○ Create Text Report

View		
● View All Inspections	○ View Unscheduled Inspections	○ View Scheduled Inspections
	○ View Portfolio Selection Criteria	

Selection Criteria
Property:
City: [   ]
State: [▼]

2. Click on the **● View All Inspections**, **○ View Unscheduled Inspections**, or **○ View Scheduled Inspections** radio button in the *View* section.

3. Enter data in the appropriate fields in the *Selection* Criteria section, if necessary.

4. Click on the **Submit** button. The **Inspections Schedule Report** displays with the inspection information matching the submitted criteria.

Inspections Schedule Report

5 Record(s) Found
Scheduled Inspections

Prev | View: 1 - 5 of 5 | Next | Select No. of Records to Show: 25 ▼ | Page No: 1 ▼ | Search Page

FHA No	Property ID	Property Name	City	State	Insp. No.	Insp. Date	Local Time	Inspector ID	Last Released Insp.Date	Prior Score	Ideal Future Date	Uninsp. Code
08976745	53668	Lake View	Vienna	VA	22103				03/29/2000	67a*	03/28/2003	IN
35567221	800045632	Fair Homes	Washington	DC	2009				04/17/2000	91c*	04/17/2003	IN
08437383	800066666	Skyline	McLean	NY	2000	Dec 17 2000	2:00PM	M00384	10/21/1999	79c*	10/21/2000	IN
08433444	800076767	Charles Smith	Falls Church	NY	2002	Dec 18 2000	11:00AM	M00384	09/21/1999	67a*	10/14/2000	IN
08375383	8000806081	Hilltop Apartments	Louisville	KY	2010	Dec 15 2000	3:00AM	M00384	10/21/1999	79c*	10/21/2000	IN

Back to Search Page

Physical Inspection Main Menu

To View Property Information, Inspection Summary Reports or Investor Reports from the Inspections Schedule Report:

Click on the *PHA No* or *Property ID* link on the **Inspections Schedule Report** to review and update the **Property Information** screen, or to view prior **Inspection Summary Reports** or **Investor Reports**. The SKYLINE (800066666) property screen is shown below.

Skyline

Property Information

Property Information	**Prior Inspection Data**

Property ID:	800066666	FHA Number:	08437383
Inspection No.:	2000	Building Count:	0
Property Name:	SKYLINE		

Property Address:

Street:	1592 Skyline ST NW
City:	McLean	State: NY	Zip: 20202 - 0000
Phone:	(202)70849	Fax: 2027084932
Email:	

Management Agent Information:

Name:		
Organization:	STEVEN MANAGEMENT COMPANY, INC.	
Street:		
City:	Rockville	State: MD	Zip: 20603 - 0424
Phone:	(703)4356787 ext- 467	Fax:
Email:	stevenmanagement@erols.com	

Update Profile   Reset

Physical Inspection Main Menu

Servicing Mortgagees can edit all fields on this screen to update the property information.

a. Click in the appropriate field and enter new or revised data.

b. Click on the [Update Profile] button to save the property information in the
    database. A message displays confirming the update.

> **Update Profile**
>
> The Profile update was successful.
>
> Back to Search Page
> Physical Inspection Main Menu

c. Click on the Back to Search Page link to return to the **Schedule Inspections** screen
    or click on the Physical Inspection Main Menu link to return to the **Physical
    Inspection Main Menu** screen.

**Servicing Mortgagees can access prior Inspection Summary Reports or Investor Reports
from the Property Information screen.**

a. Click on the Prior Inspection Data link. The **Prior Inspection Information** screen
    displays.

> **SKYLINE**
>
> (FHA NO: 08437383 Property ID: 800066666)
>
> | Prior Inspection Information | | | | | | |
> |---|---|---|---|---|---|---|
> | **Property Information** | | | Prior Inspection Data | | | |
> | **Insp. No.** | **Insp. Date** | **Insp. ID** | **Insp. Name** | **Score** | **Inspection Report** | **Investor Report** |
> | 1536 | 02/14/2000 | M56342 | Murthy Krishna | 71b | View Report | View Report |
> | 1202 | 09/01/1999 | M00002 | Steven Martino | 74b | View Report | View Report |
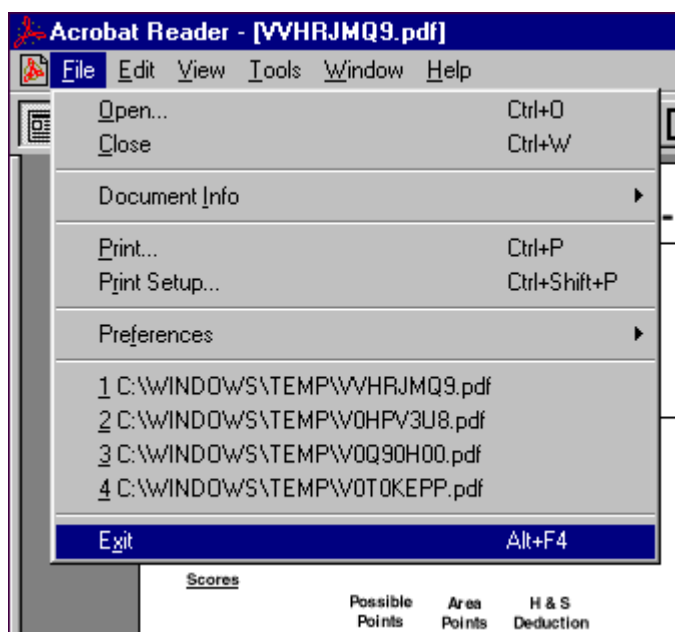>
> Physical Inspection Main Menu

b. Click on the View Report link of the property to be reviewed, and the Inspection
    Summary Report displays in a PDF format. (See Appendix A for an example of an
    Inspection Summary Report)

OR

c. Click on the <u>View Report</u> link of the property to be reviewed, and the Investors
    Report displays in a PDF format. See Appendix B for an example of the Investor
    Report.

To close the PDF:

Click File on the Menu bar and select Exit to close the PDF and return to the **Prior
Inspection Information** screen.

d. Click on the <u>Property Information</u> link to return to the **Property Information** screen
    or click on the <u>Physical Inspection Main Menu</u> link return to **Physical Inspection
    Main Menu** screen and continue working.

Create Text Report Option

The **Create Text Report** option allows Servicing Mortgagees to download inspection schedule, inspection property and inspection participant information to their own computers in order to update or modify the data using Microsoft Word. This function should only be used if large volumes of records need to be updated.

Inspections Schedule Report

(All Inspections)
5 Record(s) Found

Highlight the text between the horizontal lines. Copy it, then paste it into a Word file.

FHA_Number;Property_Id;Prop._Name;City;State;Inspection_Id.;Insp._Date;Local_Time;Inspector_ID;Last

08976745;53668;Lake View;Vienna;VA;22103;;;;03/29/2000;67a*;03/28/2003;IN; ^
35567221;800045632;Fair Homes;Washington;DC;2009;;;;04/17/2000;91c*;04/17/2003;IN; ^
08437383;800066666;Skyline;McLean;NY;2000;Dec 17 2000;2:00PM;M00884;10/21/1999;79c*;10/21/2000;IN; ^
08437444;800076767;Charles Smith;Falls Church;NY;2002;Dec 18 2000;11:00AM;M00884;09/21/1999;67a*; 10/14/2000; IN; ^
08375383;8000806081;Hilltop Apartments;Louisville;KY;2010; Dec 15 2000; 3:00PM; M00884; 10/21/1999; 79c*;10/21/2000; IN; ^

[Physical Inspection Main Menu]

To create a text report:

1. Click on the [○ Create Text Report] radio button in the *Function* section of the **Scheduled Inspections** screen.

Schedule/View Inspections or Portfolio

Function		
○ Schedule Inspection	○ View Web Page Report	◉ Create Text Report

View		
◉ View All Inspections	○ View Unscheduled Inspections	○ View Scheduled Inspections
	○ View Portfolio Selection Criteria	

Selection Criteria		

Property:

City: [   ]

2. Click on the ⭕ **View All Inspections** , ⭕ **View Unscheduled Inspections** or ⭕ **View Scheduled Inspections** radio button in the *View* section.

3. Update the appropriate fields in the *Selection Criteria* section of the screen, if necessary.

4. Click on the Submit button. The **Text Reports** screen displays:

Text Reports

Inspection Schedule Text Report

Inspection Property Text Report

Inspection Participant Text Report

Participant Role Reference Text Report

5. Select the appropriate Text Report link to download. In the example below, **Inspection Schedule Text Report** is selected.

Inspections Schedule Report

(All Inspections)
5 Record(s) Found

Highlight the text between the horizontal lines. Copy it, then paste it into a Word file.

_____

FHA_Number;Property_Id;Prop._Name;City;State;Inspection_Id.;Insp._Date;Local_Time;Inspector_ID;Last

08976745;53668;Lake View;Vienna;VA;22103;;;;03/29/2000;67a*;03/28/2003;IN; ^
35567221;800045632;Fair Homes;Washington;DC;2009;;;;04/17/2000;91e*;04/17/2003;IN; ^
08437383;800066666;Skyline;McLean;NY;2000;Dec 17 2000;2:00PM;M00884;10/21/1999;79e*;10/21/2000;IN; ^
08437444;80007d767;Charles Smith;Falls Church;NY;2002;Dec 18 2000;11:00AM;M00884;09/21/1999;67a*; 10/14/2000; IN; ^
08375383;8000806081;Hilltop Apartments;Louisville;KY;2010; Dec 15 2000; 3:00PM; M00884; 10/21/1999; 79e*;10/21/2000; IN; ^
_____

Physical Inspection Main Menu

6. Highlight the text.

Inspections Schedule Report

(All Inspections)
5 Record(s) Found

Highlight the text between the horizontal lines. Copy it, then paste it into a Word file.

FHA Number;Property Id;Prop. Name;City;State;Inspection Id.;Insp. Date;Local Time;Inspector ID;Las

88976745;53668;Lake View;Vienna;VA;22103;;;;03/29/2000;67a*;03/28/2003;IN; ^
85567221;800043632;Far Homes;Washington;DC;2009;;;04/17/2000;91c*;04/17/2003;IN; ^
88437383;800066666;Skyline;McLean;NY;2000;Dec 17 2000;2:00PM;M00884;10/21/1999;79c*;10/21/2000;IN; ^
88437444;800076767;Charles Smith;Falls Church;NY;2002;Dec 18 2000;11:00AM;M00884;09/21/1999;67a*; 10/14/2000; IN; ^
88375333;8000806081;Hilltop Apartments;Louisville;KY;2010; Dec 15 2000; 3:00PM; M00884; 10/21/1999; 79c*;10/21/2000; IN; ^

Physical Inspection Main Menu

7. Copy the text by depressing the CTRL and C keys, or selecting the copy command in the Edit menu.

8. Open the Microsoft Word application. A blank Microsoft Word screen displays.
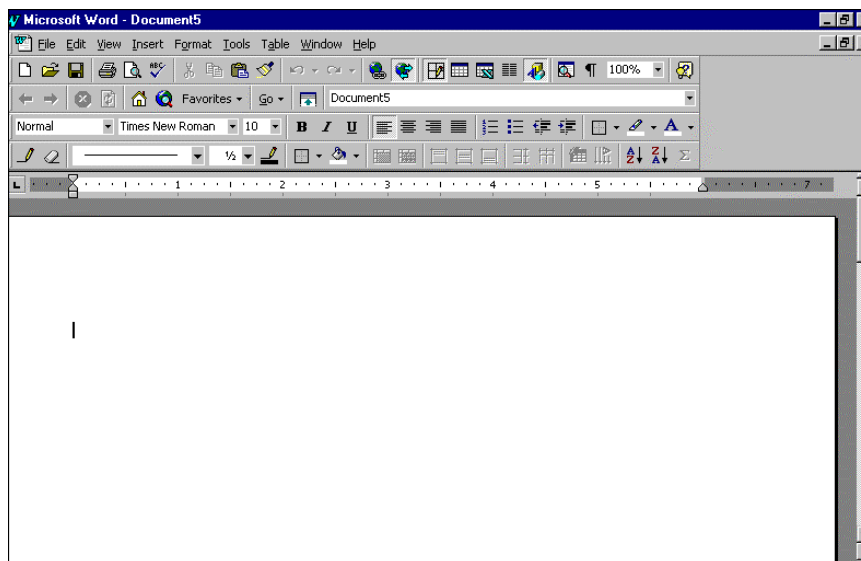
Note: To ensure that the information is placed in the Word document properly, take the following steps:
   - Click on File, then Page Setup
   - Click on the Margin tab, change the Top, Bottom, Left, and Right margins to 0
   - Click on the Paper Size tab and change the Orientation to Landscape
   - Click on the ☐ OK ☐ button.
   - Change the font style to Arial, the font size to 8.
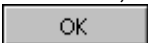
9. Paste the highlighted text into the screen by depressing the CRTL and V keys or select the Paste command in the Edit menu.
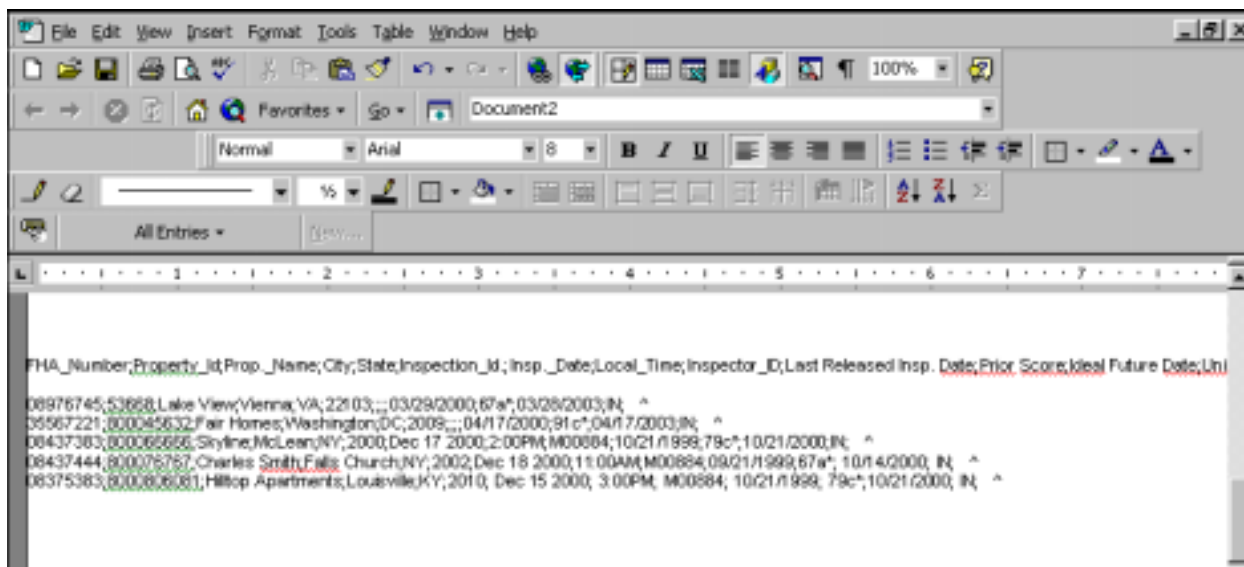
10. Highlight all of your text using your mouse, then click on Table in the Menu Bar and select Convert Text to Table.
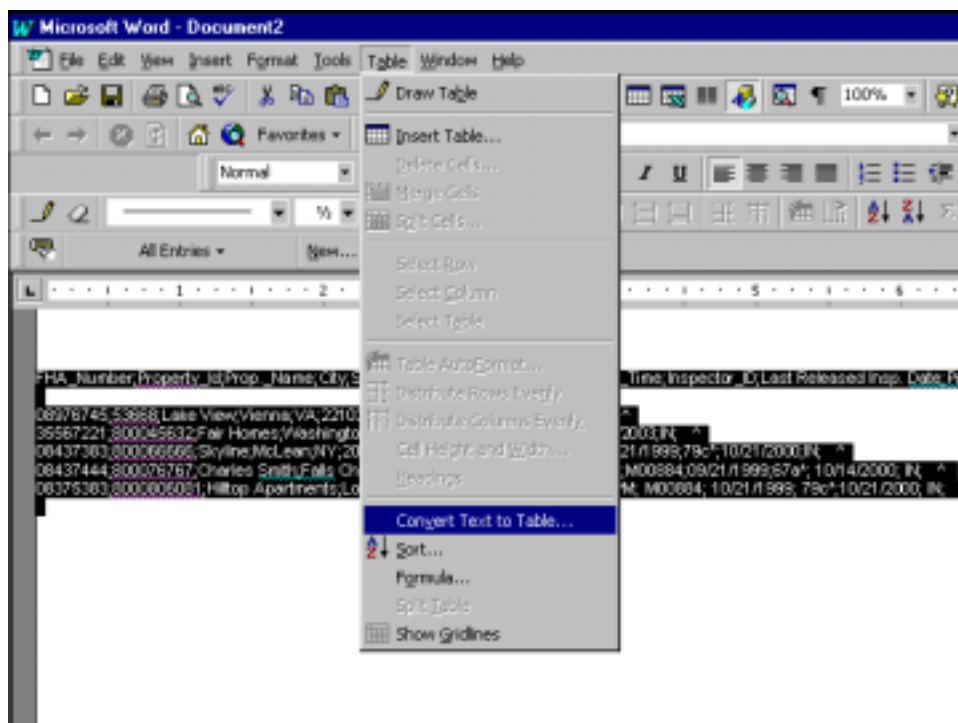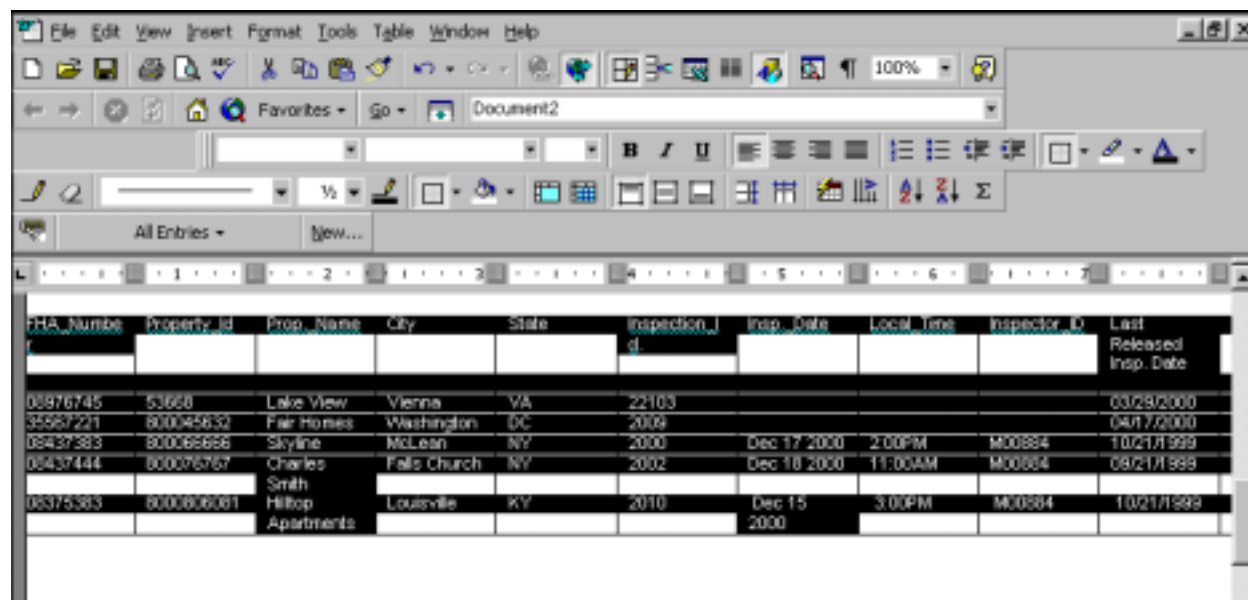
The Convert Text to Table window displays.

11. Enter 14 in the Number of Columns field, click on the Other (semicolon ;) radio button to separate text, then click on the ⬚ OK ⬚ button.
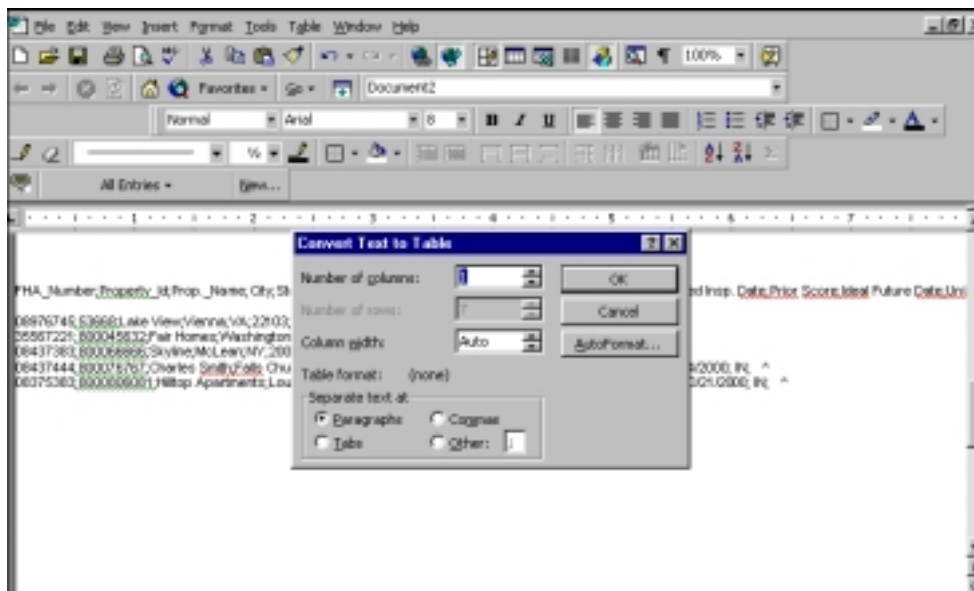
The data is formatted into a table. Update the inspection schedule information as needed.

After the data has been updated, convert the table back to text.

12. Click on a column within the table.

13. Click on Table in the Menu Bar and click Select Table.

14. Click on the Table in the Menu Bar and select Convert Table to Text.

15. Click on the Other radio button (semicolon) and click on the [OK] button.

Convert Table To Text ❓ ❌

Separate text with
- ○ _P_aragraph marks
- ○ _T_abs
- ○ Co_m_mas
- ● _O_ther: [;]

[OK]   [Cancel]

16. Save the file as a text file to later use for the bulk upload process. The file must have a .txt extension.

NOTE: Whenever a Word document is saved as a .txt file, a blank row is placed after the last row of data. This blank row must be removed from the txt file before it is used in the Bulk Upload process. Complete steps 17 – 23 to remove the blank row.

17. Click on the Start button on your desktop. Select Programs, then Accessories and finally Notepad. The **Untitled – Notepad** screen displays.

Untitled - Notepad ▫🗖❌
File Edit Search Help
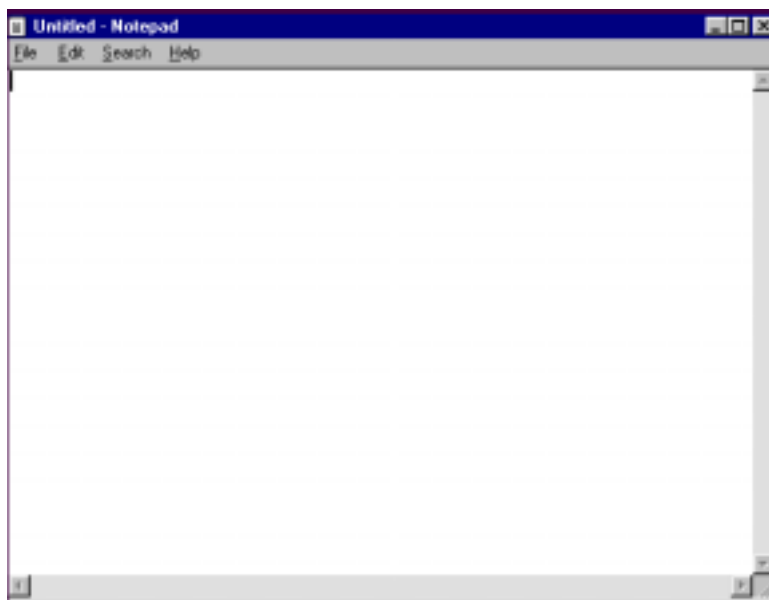
18. Click on File in the toolbar menu and select Open.
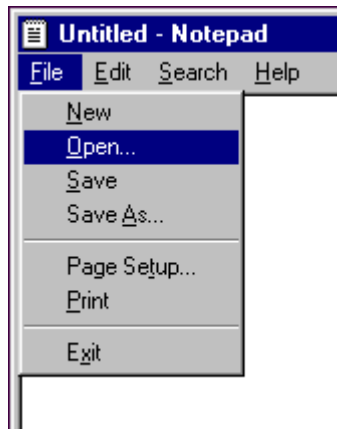
The **Open** window displays.
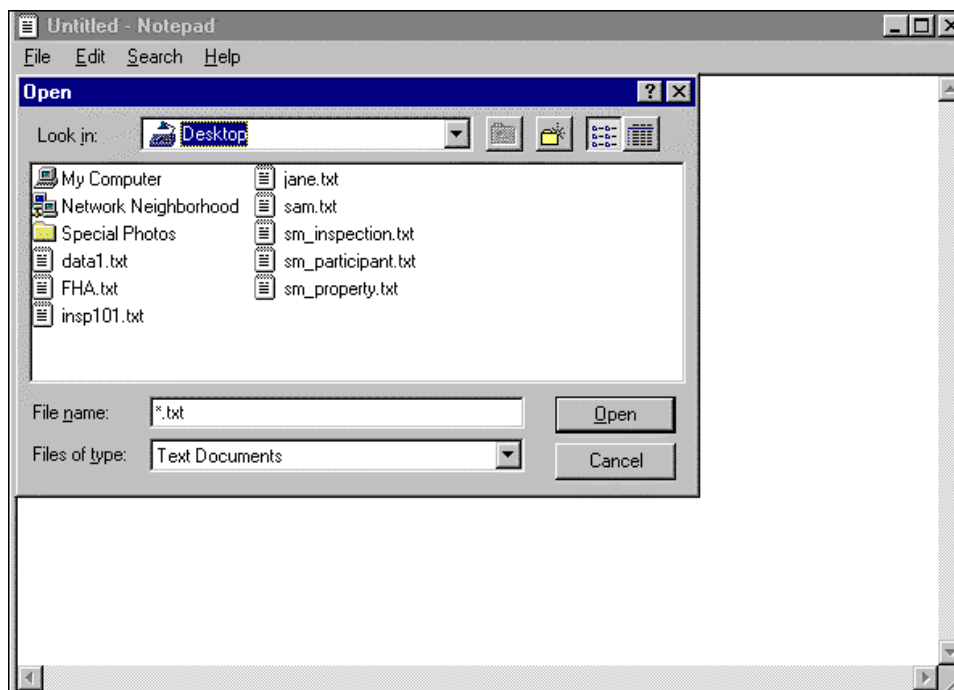
19. Click on the *Look in*: drop-down arrow and select the location where the txt file is stored. Once located, click twice on the file and the File Name field is updated with the name of the .txt file. Click on the Open button.
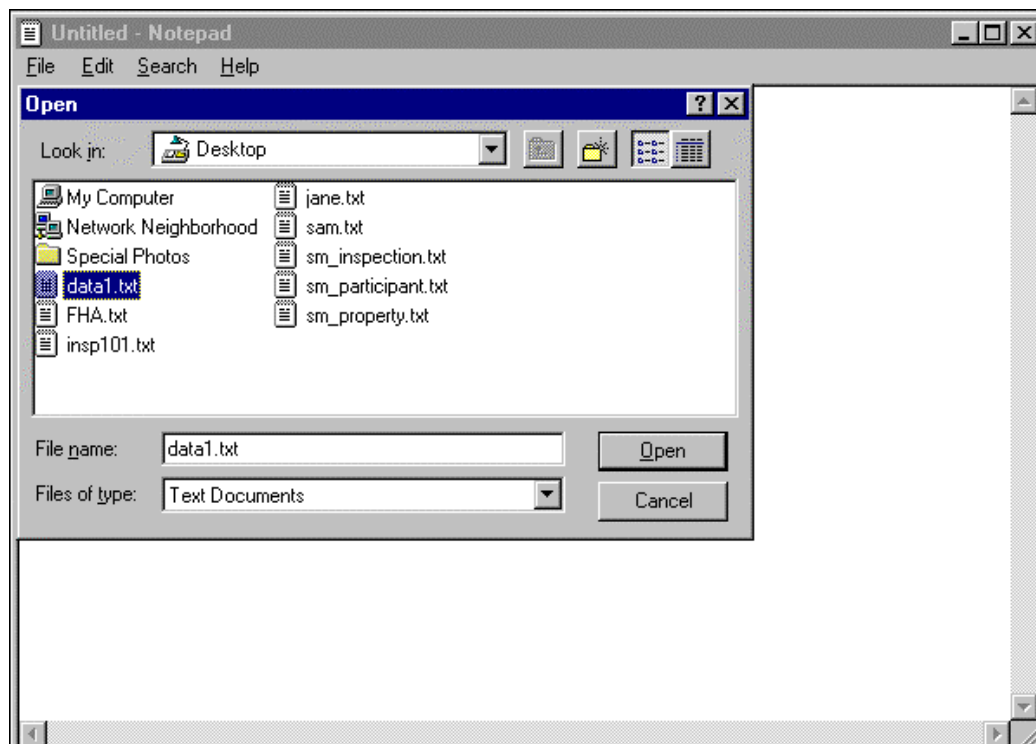
The txt file displays in Notepad.

NOTE: Notice the blank row after the last row of data.
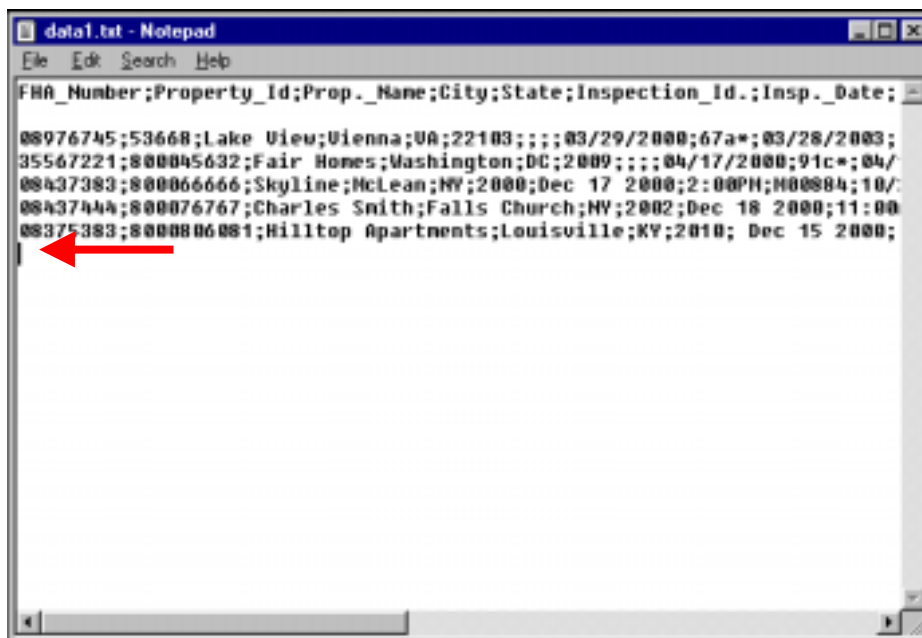
20. Move your cursor to the end of the last row and click on the Delete button.

```
data1.txt - Notepad                                    _ □ ×
File  Edit  Search  Help
_ID;Last Released Insp. Date;Prior Score;Ideal Future Date;Uninsp. Code


000;IN;        ^
;67a*; 10/14/2000; IN;      ^
21/1999; 79c*;10/21/2000; IN;      ^
```
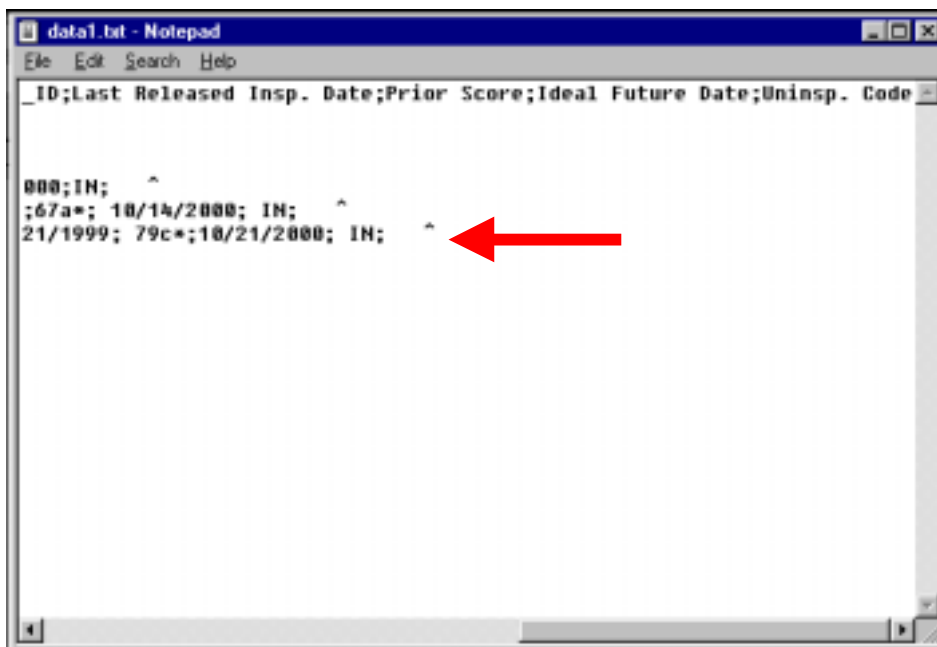
21. Move your cursor (using the scroll bar) back to left. The cursor cannot move below the last
    row of data because the blank row has been deleted.

```
data1.txt - Notepad                                    _ □
File  Edit  Search  Help
FHA_Number;Property_Id;Prop._Name;City;State;Inspection_Id.;Insp._Date;

08976745;53668;Lake View;Vienna;VA;22103;;;;03/29/2000;67a*;03/28/2003;
35567221;800045632;Fair Homes;Washington;DC;2009;;;;04/17/2000;91c*;04/
08437383;800066666;Skyline;McLean;NY;2000;Dec 17 2000;2:00PM;M00884;10/
08437444;800076767;Charles Smith;Falls Church;NY;2002;Dec 18 2000;11:00
08375383;8000806081;Hilltop Apartments;Louisville;KY;2010; Dec 15 2000;
```

NOTE: Before this text file can be used in the Bulk Upload Process the row with column
             titles (FHA Number, Property ID, etc.) and the blank row must be deleted.

22. Highlight and delete the first two rows of the Notepad.

```
data1.txt - Notepad                                        _ □
File   Edit   Search   Help
FHA_Number;Property_Id;Prop. Name;City;State;Inspection_Id.;Insp. Date:

08976745;53668;Lake View;Vienna;VA;22103;;;;03/29/2000;67a*;03/28/2003
35567221;800045632;Fair Homes;Washington;DC;2009;;;;04/17/2000;91c*;04/
08437383;800066666;Skyline;McLean;NY;2000;Dec 17 2000;2:00PM;M00884;10/
08437444;800076767;Charles Smith;Falls Church;NY;2002;Dec 18 2000;11:00
08375383;8000806081;Hilltop Apartments;Louisville;KY;2010; Dec 15 2000;
```

The screen re-displays and the two rows are deleted.

```
data1.txt - Notepad                                     _ □ ×
File   Edit   Search   Help
08976745;53668;Lake View;Vienna;VA;22103;;;;03/29/2000;67a*;03/28/2003;
35567221;800045632;Fair Homes;Washington;DC;2009;;;;04/17/2000;91c*;04/
08437383;800066666;Skyline;McLean;NY;2000;Dec 12 2000;P;H00884;10/21/19
08437444;800076767;Charles Smith;Falls Church;NY;2002;Dec 18 2000;A;H00
08375383;800806081;Hilltop Apartments;Louisville;KY;2010;Dec 15 2000;P;
```

23. Save the file as a txt file.
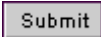
    NOTE: The file is now ready for the Bulk Upload Process.

View Portfolio Selection Criteria

Servicing Mortgagees can view a list of their properties by selecting the *View Portfolio Selection Criteria* view option located on the **Schedule/View Inspections or Portfolio** query screen. Once the *View Portfolio Selection Criteria* option is selected, the **View Portfolio Query** screen displays. The Servicing Mortgagee can limit the number of properties displayed by entering information in the Selection Criteria section of the screen.

Special features of the View Portfolio query screen	
Feature	**Description**
Submit	This button initiates the action to locate portfolios based on information entered for the query.
Reset	This button returns all fields to the original information.
Physical Inspection Main Menu	The Physical Inspection Main Menu link returns the Servicing Mortgagee to the **Physical Inspection Main Menu** screen where other PASS components can be accessed.

Query Fields

All the query fields in the Selection Criteria section are optional. To execute a search Servicing Mortgagees can complete all, some, or leave the fields blank. The more information provided in the query search reduces the number of unnecessary results. For example, if 25 properties are in the portfolio, and no specific information about those properties is entered, the **View Portfolio** screen displays all 25 properties once submitted. However if an Servicing Mortgagee prefers to view only properties for the state of Virginia, they select Virginia in the *State* field and the **View Portfolio** screen displays only those properties for Virginia.

- The *Function* section determines what Servicing Mortgagees can do with the portfolio information by clicking on the appropriate radio button. Servicing Mortgagees have two options:

    - *View Web Screen Report* allows Servicing Mortgagees to view or print the **View Portfolio** screen

    - *Create Text Report* allows Servicing Mortgagees to download portfolio information

Clicking on any of the **View** options return the Servicing Mortgagee to the **Schedule/View Inspections or Portfolio** query screen.

- The *City* field allows Servicing Mortgagees to search for inspections by a particular city.

- The *State* field allows Servicing Mortgagees to search for inspections by states and territories using the drop-down list.

- The *Zip Code* field allows Servicing Mortgagees to search for inspections by postal zip code.

- The *Scoring Range* field allows Servicing Mortgagees to search by score(s) of the last released inspection.

  NOTE: If a score is only entered in the *From* field, the query results will list all scores equal to or greater than the score entered.

  If a score is only entered in the *To* field, the query results will list all scores equal to or less than the score entered.

  To generate a search for only one score, enter the same score in the *From* and *To* fields.

- The *Ideal Future Inspection Date* allows Servicing Mortgagees to search for inspection schedules with the ideal future inspection date, selecting the *Begin* and *End* dates of the time frame by clicking on the calendar icon.

To use the calendar box:

1. Click on the icon to view the current month in the calendar box. The current date is highlighted.

2. Select a date by:

   - Click on a date (e.g., 09) to select a date in the current month.

   - To move backward or forward by year, click once on the symbols (**|<** or **>|**) per year.

   - To move backward or forward by month, click once on the symbols (**<** or **>**) per month.

   - Users can also use the drop-down arrows to select the month and year from the Month and Year menus. The calendar changes once the month and year are selected, then the Servicing Mortgagees click on a specific date within the month.

The calendar box closes once a date is selected, or click on the Close control **X** icon to close the window.

  NOTE: If a date is only entered in the *Begin* field, the query results will list all ideal future inspection dates equal to or greater than the ideal future inspection date entered.

> If a date is only entered in the *End* field, the query results will list all ideal future inspection dates equal to or less than the ideal future inspection date entered.
>
> To generate a search for one ideal future inspection date, enter the same date in the *Begin* and *End* fields.

- The *FHA Number* field allows Servicing Mortgagees to search for inspections by a specific FHA number.

Once the query is generated, the results of the query are displayed on the **View Portfolio** screen. From this screen, the Servicing Mortgagee can access the **Property Information** screen where additional information about the individual property can be viewed or revised. In addition, the Servicing Mortgagee can access prior **Inspection Summary Reports** or **Investor Reports** from the **Property Information** screen.

View Portfolio

Prev | View: 1 - 6 of 6 | Next | Select No. of Records to Show: 25 ▼ | Page No: 1 ▼ | Search Page

FHA No	Property ID	Property Name	City	State	Last Insp. Date	Prior Score	Ideal Future Insp. Date
08976745	53668	Lake View	Vienna	VA	03/29/2000	67a*	03/28/2003
35567221	800045632	Fair Homes	Washington	DC	04/17/2000	91c*	04/17/2003
06444081	800049242	Sunrise Towers	Dallas	TX	10/02/1999	64c*	10/02/2000
08375383	800806081	Hilltop Apartments	Louisville	KY	10/21/1999	79c*	10/21/2000
06238374	80041944	OakWood Apartments	Boligee	AL	09/17/1999	90c*	09/17/2002
06275211	800968164	Cliff Towers	Birmingham	AL	10/02/1999	69c	10/02/2000

Physical Inspection Main Menu

View Portfolio

Feature	Description
Prev	View: 1 - 25 of 30	Next	These buttons allow Servicing Mortgagees to view information on the previous screen or next screen. In this example, there are 25 records on the current screen. To display the remaining 5 records click on the Next button. Once records 26-30 are displayed, click on the Prev button to return to records 1-25.
Select No. of Records to Show: 25	Sets the number of records displayed at one time. The system automatically displays 25 records at a time. Records display in increments of 25, 50, 75, 100, 200 or 250 on a screen.
Page No: 1	The list of properties can be listed on more than one page. To view another page, select a different page number from the drop-down list For example, if viewing 5 of 10 pages and the Servicing Mortgagee selects page 8 from the drop-down list, page 8 displays.
Search Page	This button returns the Servicing Mortgagee to the **Schedule/View Inspections or Portfolio** query screen.
FHA No and Property ID links	Both links allow the Servicing Mortgagee to view or update the **Property Information** screen for a particular property.
Physical Inspection Main Menu	Clicking on Physical Inspection Main Menu link returns the Servicing Mortgagee to the **Physical Inspection Main Menu** screen where other PASS components can be accessed.

To access a Property Profile screen:

1. Click on a FHA
   No. or Property
   ID link (e.g.,
   Property ID
   (Example:
   800045632) on
   the **View
   Portfolio** screen.
   The **Property
   Screen** displays.
   In this example, it
   is the **Fair
   Homes
   (800045632)**
   screen.

View Portfolio

FHA No	Property ID	Property Name	City	State	Last Insp. Date	Prior Score	Ideal Future Insp. Date
08976745	53668	Lake View	Vienna	VA	03/29/2000	67a*	03/28/2003
35567221	800045632	Fair Homes	Washington	DC	04/17/2000	91c*	04/17/2003
06444081	800049242	Sunrise Towers	Dallas	TX	10/02/1999	64c*	10/02/2000
08375383	800806081	Hilltop Apartments	Louisville	KY	10/21/1999	79c*	10/21/2000
06238374	80041944	OakWood Apartments	Bokgee	AL	09/17/1999	90c*	09/17/2002
06275211	800968164	Cliff Towers	Birmingham	AL	10/02/1999	69c	10/02/2000

Physical Inspection Main Menu

Servicing Mortgagees can edit all fields on this screen to update the property information.

   a. Click in the appropriate field
   and enter new or revised data.

   b. Click on the
   Update Profile button to
   save the property information
   in the database. A message
   displays confirming the update.

Update Profile

The Profile update was successful.

Back to Search Page
Physical Inspection Main Menu

   c. Click on the Back to Search
   Page link to return to the
   **Schedule/View Inspections
   or Portfolio** screen or the
   Physical Inspection Main Menu
   link to return to the **Physical
   Inspection Main Menu** screen.

Fair Homes

Property Information

Property Information   **Prior Inspection Data**

Property ID:	800045632	FHA Number:	35567221
Inspection No.:	2000	Building Count:	0
Property Name:	Fair Homes		

Property Address:

Street: 1592 Skyline ST NW

City: Washington   State: DC   Zip: 20202 - 0000
Phone: (202)70849   Fax: 2027084932
Email:

Management Agent Information:

Name:
Organization: STEVEN MANAGEMENT COMPANY, INC.
Street:

City: Rockville   State: MD   Zip: 20603 - 0424
Phone: (703)4356787 ext: 467   Fax:
Email: stevenmanagement@erols.com

Update Profile   Reset

Physical Inspection Main Menu

Servicing Mortgagees can access prior Inspection Summary Reports or Investor Reports from the Property Information screen.

    a. Click on the Prior Inspection Data link. The **Prior Inspection Information** screen displays.

FAIR HOMES

(FHA NO: 35567221 Property ID: 800045632)

Prior Inspection Information						
Property Information			Prior Inspection Data			
Insp. No.	Insp. Date	Insp. ID	Insp. Name	Score	Inspection Report	Investor Report
1313	02/01/2000	M11111	Lena Smith	91c	View Report	View Report

Physical Inspection Main Menu

    b. Click on the View Report link of the property to be reviewed, and the Inspection Summary Report displays in a PDF format. See Appendix A for an example of an Inspection Summary Report.

OR

    c. Click on the View Report link of the property to be reviewed, and the Investors Report displays in a PDF format. See Appendix B for an example of the Investor Report.

To close the PDF:

Click File on the Menu bar and select Exit to close the PDF and return to the **Prior Inspection Information** screen.

    d. Click on the Property Information link to return to the **Property Information** screen or click on the Physical Inspection Main Menu link return to **Physical Inspection Main Menu** screen and continue working.

Exiting Scheduling

Servicing Mortgagees can exit Servicing Mortgagee Scheduling at any time. To exit the system, click on the Menu bar of the browser and select *File* and *Close* or click on the Close control **X** located at the top right of the screen.
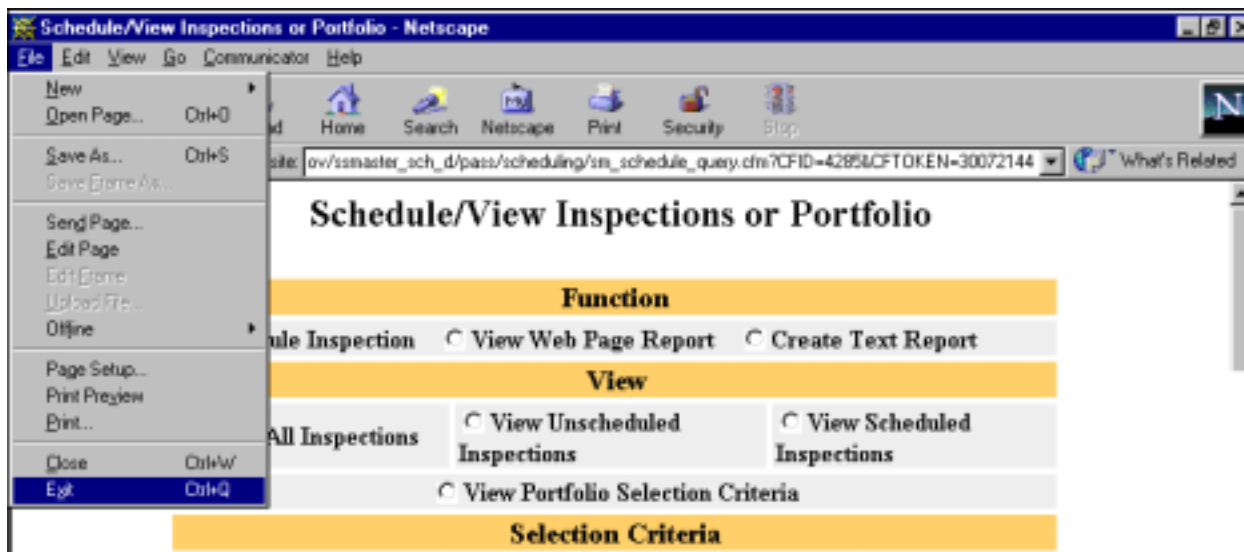
Bulk Upload Option

The Bulk File Upload option allows the Servicing Mortgagee to upload inspection schedule data to the Scheduling database. The data must be saved as a text file, with a ".txt" extension.

In addition, the data must be in the correct order with each entry separated by semicolons.

The correct order for inspection schedule information is:

- FHA Number   - FHA identification number
- Property Id   - Property identification number
- Property Name   - Property name to be inspected
- City   - City where the property of the inspection is located
- State   - State where the property of the inspection is located
- Inspection ID   - Inspection identification number
- Inspection Date   - Inspection date (mm/dd/yyyy)
- Local Time   - Time of the inspection in half hour increments from 7 AM to 3 PM
- Inspector Id   - Inspector identification number
- Last Released Insp. Date - Date of the last released inspection
- Prior Score   - Score of the last inspection of that property
- Ideal Future Date   - Theoretical future date based on the score
- Uninspectable Code   - Code that identifies inspectable and uninspectable inspections

The following is an example of a bulk upload data file for inspection schedule information:

```
643OH001;800001017;The Torains;Karry;OH:51001;May  5 1999; 7:30AM;M29999;04/05/1999;82;04/05/2001;IN;  ^
643VA002;800020029;The Oaks;Warrenton;VA;51002;May  5 1999;9:00AM;M29550;05/05/1999;35;5/05/2000;IN;  ^
543VA003;800300056;Woodtap;Richmond;VA;51003;May  5 1999;1:30PM;M29313;05/05/1999;50;05/05/1999;IN;  ^
741CA001;804000084;The Sandal;Berkley;CA;51004;May  5 1999;2:00PM;M39513;05/05/1999;90;05/05/2002;IN;  ^
695CA002;800000186;The Commons;San Polo;CA:51005;May  5 1999;P;M29777;05/05/1999;65;05/05/2001;IN;  ^
```

Helpful Hints

- There must be a caret (^) at the end of each row to ensure the Schedule Inspection data is properly updated.

- If a field contains a semicolon, example (Woodside Villa; Inc), the semicolon must be deleted from the field.

- When a Word document is saved as a .txt file, a blank row is inserted at the end of the .txt file. The blank row must be deleted before the data is loaded to the Database to prevent an error.

To access the Bulk Upload function:

1. Click on the <u>Bulk Upload</u> link from the **Physical Inspection Main Menu** screen.
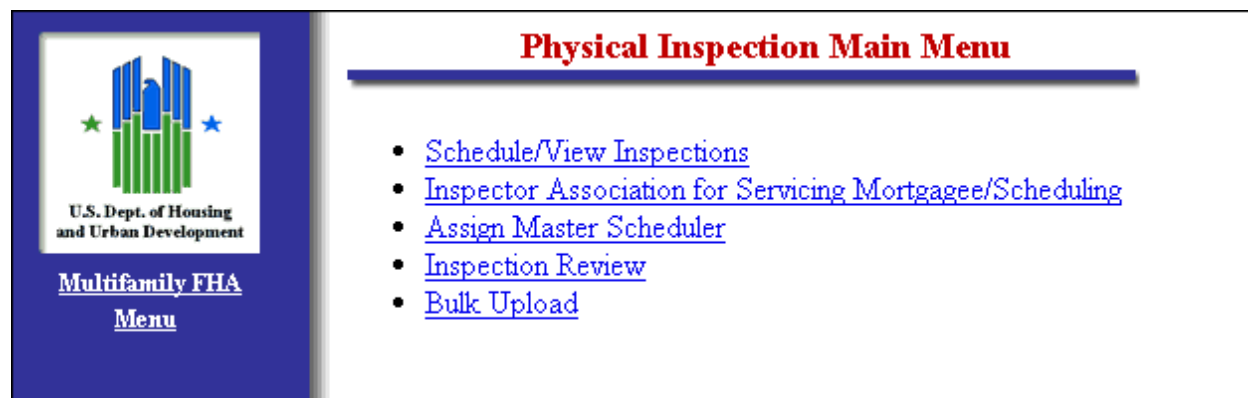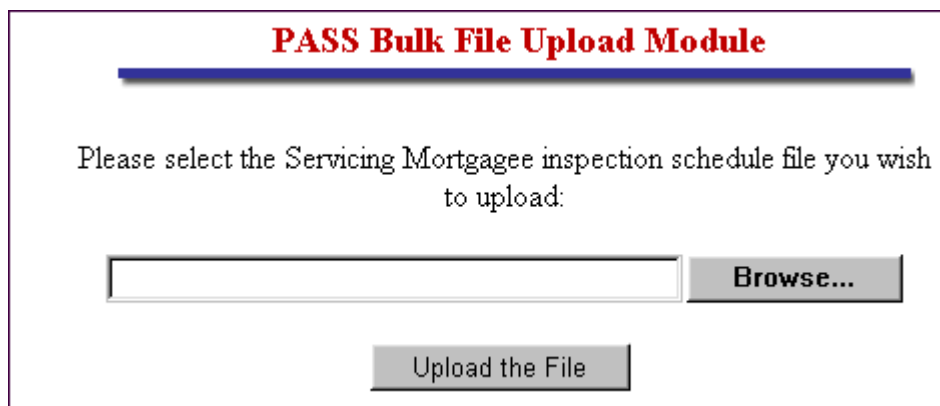

The **PASS Bulk File Upload Module** screen displays:

2. Select the link to upload (<u>Upload Inspection Schedule for Servicing Mortgagees</u>).
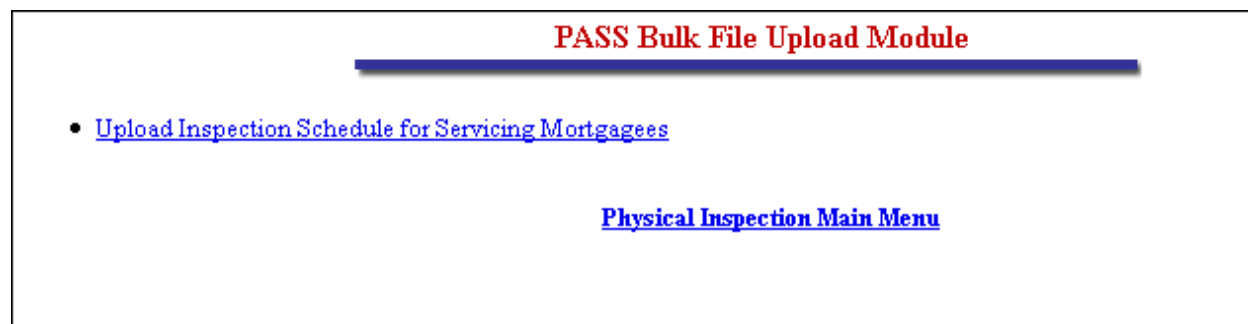
The **PASS Bulk File Upload Module** screen displays.

3. Click on the [Browse...] button to locate the file to upload. The **File Upload** dialogue box opens.

NOTE: If the pathname is known, enter the pathname in the File name field.

4. Locate and select the file.
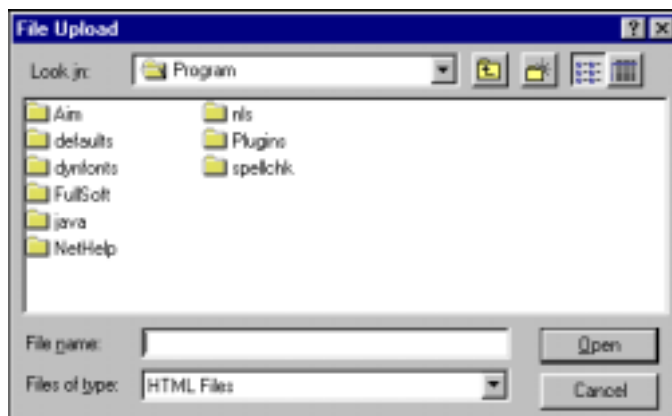
NOTE: The file must have a .TXT extension**.**

5. Click on the Open button to close the dialogue box. The **PASS Bulk File Upload Module**
    screen displays.

NOTE: The name of the file appears in the field next to the [Browse...] button.

6. Click on the [Upload the File] button.

    If the data uploads successfully, a message displays indicating the number of data
    rows successfully loaded into the database.

PASS Bulk File Upload Module

7 of 7 rows have been successfully uploaded.

Physical Inspection Main Menu

If the data does not upload successfully, a messages displays indicating the row(s) of data with errors and the type of errors. The errors must be corrected before the file can be re-uploaded. After the errors on the text file are corrected, repeat steps 1 – 6 of the bulk upload process.

7. Click on the Physical Inspection Main Menu link to return to the **Physical Inspection Main Menu** screen.

Browser Basics

Software and Hardware Requirements

The electronic scheduling of physical inspections using PASS Servicing Mortgagee Scheduling software requires computer resources and an Internet browser. The optimum software and hardware resources are recommended for efficiency, although users can operate with the minimum required resources.

Optimum Hardware Resources

Processor: Pentium I00
RAM: 16 MB
Modem: 28.8
Video card: 256k
Download file size: 5.8MB
Installed file size: 10MB

Optimum Software Resources

Windows 95
Netscape* 3.5 or HTML-compliant browser application
Adobe[#] Acrobat Reader 4.05

> **NOTE:** Users can download Netscape* 3.5 or higher (32-bit) from the Internet. The procedures to download Netscape* can be found at http://home.netscape.com/download.

Minimum Hardware Resources

Processor: 486
RAM: 8 MB
Modem: 14.4 kb
Video card: 256k
Download file size: 5.5MB
Installed file size: 10MB

Minimum Software Resources

Windows 3.1
Netscape* 3.5 or HTML-compliant browser application
Adobe[#] Acrobat Reader 4.05

Internet Basics

The Internet is a worldwide system of computer networks facilitating access to information and people. Using the Internet to access and use HUD secure systems requires an Internet connection and a computer with a modem and Netscape 4.7 or an HTML-compliant browser application. A browser allows access to web pages on the World Wide Web (WWW or the Web). The Web is a universally accepted standard for sharing information on the Internet. The Web consists of information organized into pages stored in computers physically located throughout the world.

Web Page

A web page is a document or application with a unique address on the Web, possibly including links to other pages. The **Yahoo!*** main page is shown below as an example.

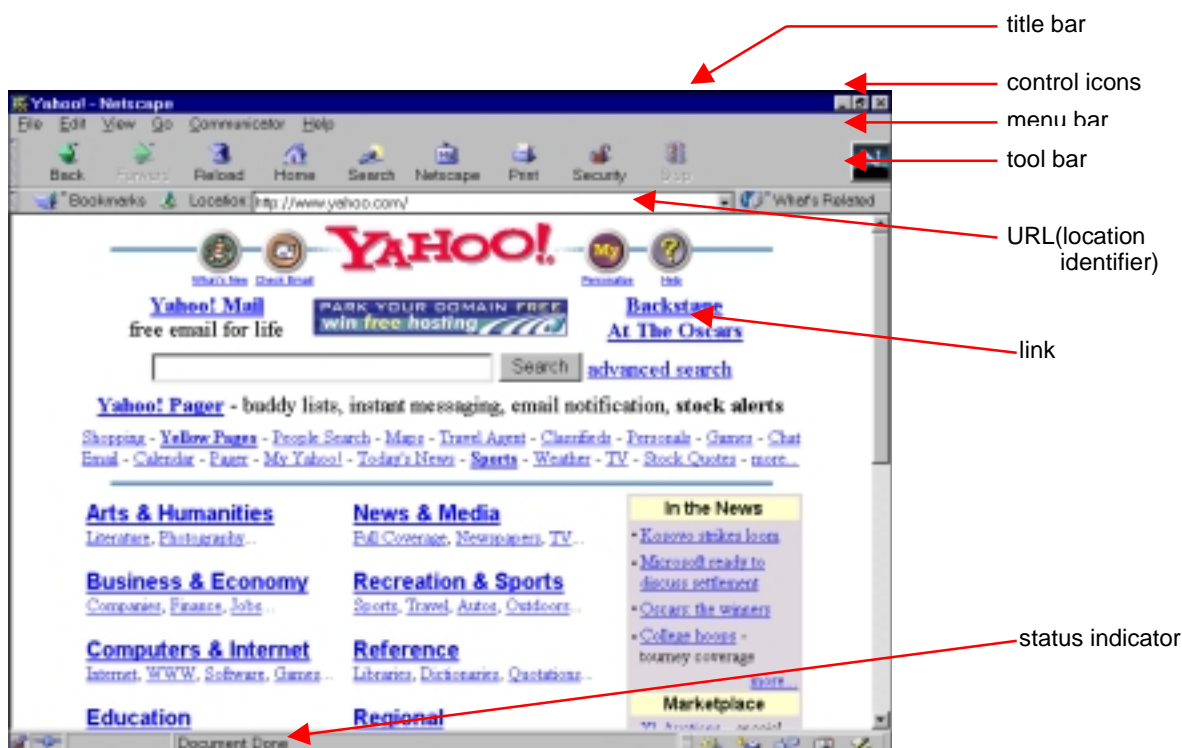*Copyright© Yahoo! Inc. All rights reserved. Protected by the copyright laws of the United States and international treaties.

Title Bar

The title bar at the top of the page displays the title of the document or application of the Web page that is active or currently displayed. When more than one window is open, the title bar of the active window is bold; the other open title bars appear faded.

Control Icons

In the right corner of the title bar, there are three control icons. With a mouse click, the Minimize
⊟ icon reduces or minimizes the window to the bottom of the page. To enlarge the window
back to full size, click on the appropriately titled box at the bottom of the page. The
Minimize/Maximize 🗗 icon reduces the window to a smaller size, allowing the user to view
other open windows or the desktop. To enlarge the window back to full size, click on 🗗 again.

The last control icon is the Close ☒ icon. Clicking on this control icon closes the browser
application (and the document or application open within the browser) and returns the user to
the desktop.

Menu Bar

The menu bar provides drop-down menus for browser functions. By placing the cursor over a
menu item and clicking on it with a left mouse button, the drop-down menu appears. Highlight
the appropriate menu function with the cursor to make a selection.
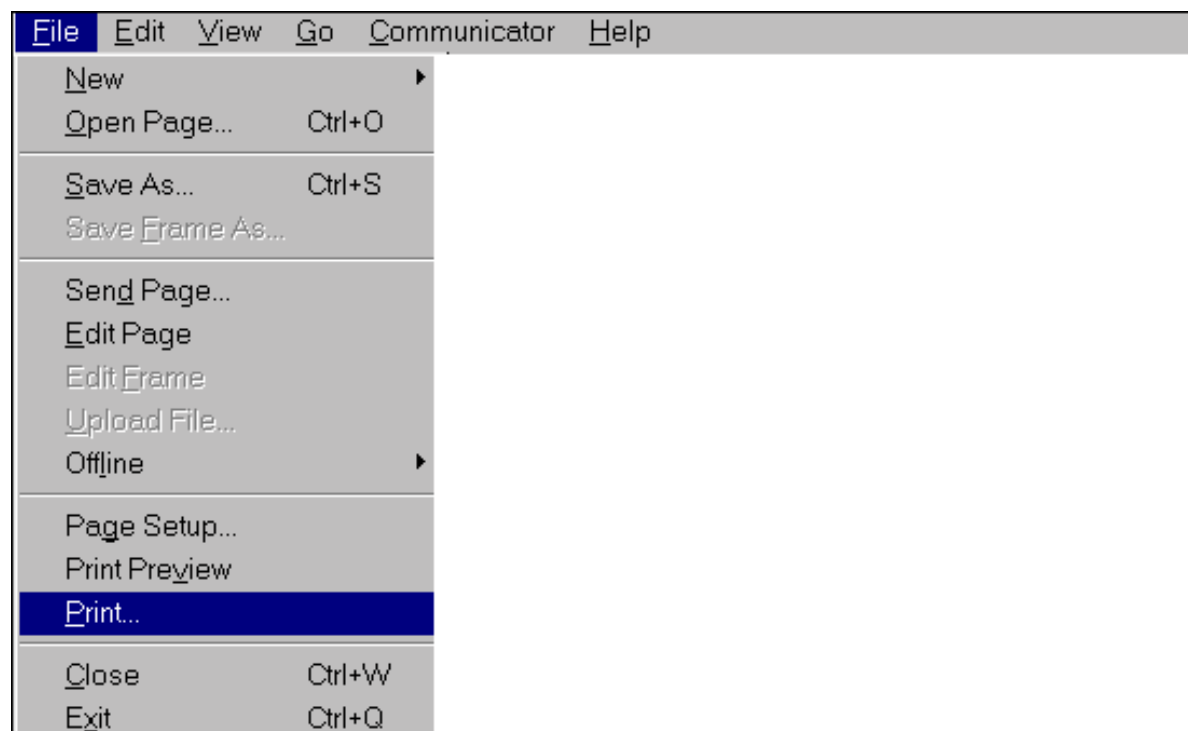
Available menu functions are text items in bold. Menu functions that are not available appear
faded and cannot be activated.

Tool Bar

The tool bar consists of buttons representing browser functions.

Available functions are buttons with bold text and graphics. A tool bar button appears faded if the function is not available.

Location Identifier

The unique location of the Web document or application is called the Uniform Resource Locator (URL). The URL is used to find a particular Web page among all the computers on the Internet. Enter the desired URL in the *Location* field and press the Enter key.

> **NOTE:**   The field is labeled "Location" for an Internet site. It is labeled "Netsite" for an intranet (internal/within the organization) site.

Status

The Netscape browser indicates the status of the action being performed. If the browser is performing an action (for example, searching a database for information): the Netscape 🅝 logo to the right of the URL address appears to have comets flying across it, the Stop sign on the tool bar is bold and red, and the status indicator line at the bottom of the page (next to the lock) describes the status (for example, "Connect . . . Waiting for reply"). Upon completion of the action, the logo returns to its static state, the Stop tool appears faded, and the status indicator line reads "Document: Done."

> **NOTE:**   The lock indicates whether the Web page is secure or not. Some Web pages can be secured or blocked from other Internet users if the page contains sensitive information, such as financial or housing information. If the lock is closed, the page is secure. If the lock is open, it is not a secure Web page.

Links

A link provides a method to move quickly from the current page to another Web page. Links are typically underlined, although they do not have to be. Click on a particular link, and it moves the user to that particular page. Once the link is accessed, it typically changes color to indicate the user has already accessed it once before.
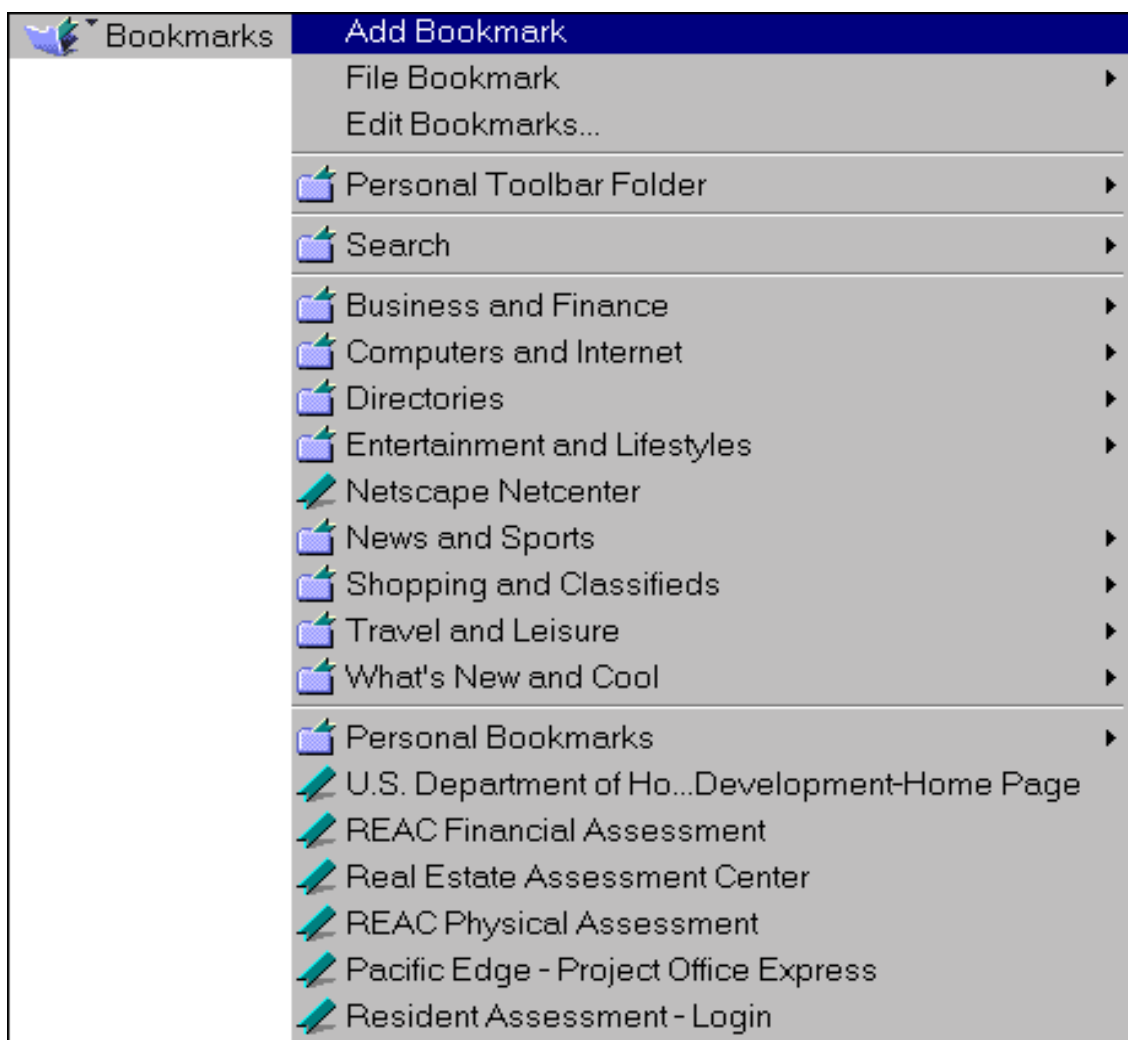
Bookmarks

The Bookmarks function is a browser tool that provides the user with quick access to a Web page. Once a Web page's title and location is marked as a bookmark in the browser, the user does not have to remember and type in the URL or go through a series of links to access that page.

Bookmarks Location: http://hudweb.hud.gov	What's Related

To bookmark the currently displayed Web page, click on Bookmarks to the left of the *Location* field for the drop-down options. Click on the Add Bookmark option to mark the page. The Web page location is added.

> **NOTE:**   The browser in this example is Netscape. Display may vary according to the browser.

All bookmark(s) appear in list form under the Bookmarks option. Clicking on a bookmark in that list takes the user directly to that page.

REAC Technical Service Support

The Servicing Mortgagee can contact staff in the Physical Inspection Operations area within REAC for assistance Monday through Friday from 8:00 A.M. to 5:30 P.M.

REAC Technical Service Phone Number
        1-877-406-9220

Technical Assistance Center

Users can contact the REAC Technical Assistance Center with any questions or problems Monday through Friday 7 a.m. to 8:30 p.m., Eastern Standard Time. The REAC Technical Assistance Center can be contacted by telephone or email.

REAC Technical Assistance Center Phone Number
        1-888-245-4860

Appendix A: Example of an Inspection Summary Report

Inspection Summary Report - 119233

Inspection No:	119233
Property:	(800000381) PARKLANE APARTMENTS
	6725 ZEIGLER BOULEVARD
	MOBILE, AL 36608
Scattered Site?:	No
Comments:	;TAC .12345;

Inspection Date:	11/13/2000
Phone:	(334) 342-2222
Fax:	(334) 342-2088
E-Mail Address:	parklane@related.com
ACC#:	
CA#:	

Building Unit Count

	#Total	#Inspected
Buildings	9	2
Units	112	1

Scores

	Possible Points	Area Points	H & S Deduction
Site	14.4	7.3	0.0
Bldg Ext	15.8	5.7	0.0
Bldg Sys	19.3	17.1	0.0
CA	15.0	11.3	0.0
Units	35.5	29.6	11.1
Overall	100.0	71.0	11.1
Final Score = Area Points - H & S Deduction			60 c

Health and Safety Counts

Non-Life Threatening	Site	Bldg	Unit	Total
Actual	0	0	1	1
%Inspected	---	22%	1%	---
Projected	0	0	112	112

Life Threatening	Site	Bldg	Unit	Total
Actual	0	2	0	2
%Inspected	---	22%	1%	---
Projected	0	9	0	9

Smoke Detectors	Site	Bldg	Unit	Total
Actual	0	0	0	0
%Inspected	---	22%	1%	---
Projected	0	0	0	0

Systemic Deficiencies:

	Area	Item	Defect	# with Defect	# Total	% of Bldgs / Units with Defect
Capital*	BldgExt	Foundations	Cracks/Gaps**	2	2	100%
			Spalling/Exposed Rebar**	2	2	100%
Ordinary**	None					

* Capital items are repairs that generally require large cash outlays. (Items such as new roofs and new appliances).
** Ordinary items are repairs that require smaller cash outlays. (Items such as light fixtures, fire extinguishers, and smoke detector

Participants:

Management Agent Related Management Co.L.P.	Angela Root,	Phone: Fax: E-Mail Address:	(770) 612-8810 (770) 612-0399		6425 Powers Ferry Rd Atlanta, GA 30339-0000	
Owner/PHA Zeigler Blvd, LTD	Z,	Phone: Fax: E-Mail Address:	(212) 319-1200 () -		625 Madison Avenue New York, NY 10022	
Site Manager Parklane Apts.	Dixon, Shawn	Phone: Fax: E-Mail Address:	(334) 342-2222 (334) 342-2088 parklane@related.com		6725 Zeigler Rd Mobile, AL 36608	

Buildings/Units:

No	Name/Type/Reason Uninspectable	Year built	# Units	Address
1	1 Low Rise/Garden Apartment *Fire Damage*	1979	16	6725 ZEIGLER BOULEVARD MOBILE AL 36608
2	2 Low Rise/Garden Apartmen *Other Hazard*	1979	16	6725 ZEIGLER BOULEVARD MOBILE AL 36608
3	3 Low Rise/Garden Apartment *Vacant*	1979	16	6725 ZEIGLER BOULEVARD MOBILE AL 36608

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Inspection Summary Report - 119233

4	4 Low Rise/Garden Apartmen *Offline*	1979	16	6725 ZEIGLER BOULEVARD MOBILE AL 36608
5	5 Low Rise/Garden Apartment	1979	8	6725 ZEIGLER BOULEVARD MOBILE AL 36608

	a	Efficiency	Occupied	*Occupant Refusal*
	Comments: test			
	b	3 Bedroom	Occupied	*Occupant Refusal*
	c	2 Bedroom	Occupied	*Offline*
	Comments: test			
	d	1 Bedroom	Occupied	
	e	Efficiency	Occupied	*Occupant Refusal*
	Comments: test			
	f	1 Bedroom	Occupied	*No Keys*
	Comments: test			
	g	2 Bedroom	Occupied	*Offline*
	Comments: test			

6	6 Common Building	1979	0	6725 ZEIGLER BOULEVARD MOBILE AL 36608
7	7 Low Rise/Garden Apartment *Occupant Refusal*	1979	16	6725 ZEIGLER BOULEVARD MOBILE AL 36608
8	8 Low Rise/Garden Apartment *Police Restricted Area*	1979	8	6725 ZEIGLER BOULEVARD MOBILE AL 36608
9	9 Low Rise/Garden Apartmen *Offline*	1979	16	6725 ZEIGLER BOULEVARD MOBILE AL 36608

Comments: unit 104 vacant, no utilities

Inspectable Items:

Inspected Item	NO/OD	Observation	Severity	Location/Comments	Ded.
Certificates					
Elevator	NO				
Lead Based Paint Disclosure Form	NO				
Site				**Possible Points:**	**14.4**
Parking Lots/Driveways/Roads	OD	Ponding**	Level 2		2.0
		Potholes/Loose Material**	Level 3	Location: test; Comments: est	4.0
		Settlement/Heaving**	Level 1		1.0
Building 5 - Building Exterior				**Possible Points:**	**156.3**
Fire Escapes	OD	Blocked Egress/Ladders (LT)	Level 3	Location: test; Comments: test	126.6
Foundations	OD	Cracks/Gaps**	Level 2		63.3
		Spalling/Exposed Rebar**	Level 2		38.0
Roofs	OD	Damaged Soffits/Fascia	Level 1		19.0
		Damaged/Clogged Drains**	Level 2		63.3

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Inspection Summary Report - 119233

Building 5 - Building Exterior				Possible Points:	158.3
Roofs	OD	Damaged/Torn Membrane/Missing Ballast	Level 2		63.3
		Missing/Damaged Components from Downspout/Gutter**	Level 2		28.5
		Missing/Damaged Shingles**	Level 3	Location: test; Comments: test	126.6
Building 5 - Building Systems				**Possible Points:**	**223.4**
Fire Protection	OD	Missing/Damaged/Expired Extinguishers**	Level 2		88.3
Building 5 - Common Areas				**Possible Points:**	**14.1**
Day Care	OD	Ceiling - Peeling/Needs Paint**	Level 2		0.4
		Ceiling - Water Stains/Water Damage/Mold/Mildew**	Level 2		0.9
		Doors - Damaged Frames/Threshold/Lintels/Trim**	Level 2		0.9
		Doors - Damaged Surface - Holes/Paint/Rusting/Glass**	Level 2		1.6
Building 5 - Building Exterior - Health & Safety					
Emergency/Fire Exits	OD	Emergency/Fire Exits Blocked/Unusable (LT)	Level 3	Location: est; Comments: test	126.6
Building 5 - Unit d				**Possible Points:**	**35.5**
Electrical System	OD	Burnt Breakers (NLT)	Level 3	Location: et; Comments: test	11.1
HVAC System	OD	Noisy/Vibrating/Leaking**	Level 1		4.2
		Rust/Corrosion**	Level 1		1.7
Building 6 - Building Exterior				**Possible Points:**	**15.8**
Foundations	OD	Cracks/Gaps**	Level 2		6.3
		Spalling/Exposed Rebar**	Level 2		3.8
Building 6 - Building Systems				**Possible Points:**	**19.3**
HVAC	OD	General Rust/Corrosion	Level 2		2.2
Building 6 - Common Areas				**Possible Points:**	**0.9**
FHEO - Accessible Outside Commu	OD	Routes Obstructed or Inaccessible to Wheelchair**		Location: test; Comments: tewt	

NOTE: Score for any given building or unit can not be negative (if deductions are greater than possible points, the score is set to zero)

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Appendix B: Example of an Investor Report

Investor Physical Inspection Report

U.S. Department of Housing
and Urban Development /
Mortgagee Inspection

FHA NUMBER:	INSPECTION SCORE:	60c

Inspection Date (mm/dd/yy):	11/13/00	Report Submitted By
Inspection Number:	119233	Servicing Mortgagee:
Previous Inspection Date:		Previous Inspection Score:

				# Total	# Inspected
Property Name:	PARKLANE APARTMENTS				
Property Address:	6725 ZEIGLER BOULEVARD		Buildings:	9	2
Property City/ST/Zip:	MOBILE, AL 36608		Units:	112	1
Occupancy %:			Scattered Sites (Y/N):	N	
Section of the Act:					

Participants:	Name	Phone/Fax/E-mail	Address
Management Agent	Angela Root, Related Management Co.L.P.	(770) 612-8810 phone (770) 612-0399 fax none available	6425 Powers Ferry Rd Atlanta, GA 30339-0000
Owner/PHA	Z, Zeigler Blvd, LTD	(212) 319-1200 phone () - fax none available	625 Madison Avenue New York, NY 10022
Site Manager	Dixon, Shawn Parklane Apts.	(334) 342-2222 phone (334) 342-2088 fax parklane@related.com	6725 Zeigler Rd Mobile, AL 36608

Inspection Firm	Inspector	Inspector REAC Number	Inspector Telephone
USDA	ATS, ATSUSER	H12345	

Scores

Components	Possible Points	Points Received	Percentage Score	Health & Safety deductions	Health & Safety (H&S) codes in Final Score:
Site	14	7	50	0	a = no health and safety concerns
Building Exterior	16	6	38	0 c	b = non-life threatening H&S concern
Building Systems	19	17	89	0	c = life threatening H&S concerns
Common Areas	15	11	73	0	(except smoke-detectors)
Units	35	30	86	11b	* = smoke detector not working
Overall	100	71	71	11	

		Percent
Total Building Exterior	= Site + Building Exterior	43
Total Building Interior	= Building Systems + Common Areas + Units	84
Final Score	= Points Received - Health & Safety Deduction + H&S code	**60** c

Note: The Investor Physical Inspection Report was prepared by REAC for use by servicing mortgagees. The design was specified by a working group of active servicing mortgagees and in large part is a reformatting of the existing Inspection Summary Report.

Investor Report   Page 2   FHA Number: Property Name: **PARKLANE APARTMENTS**

Specific Units Inspected: 1   **Percent of units Inspected: 1%**

Building	Type	Year Built	Units
6	Common Building	1979	None
5	Low Rise/Garden Apartment	1979	d

Units with **Level 3 or Level 2** Severity of Observed Deficiencies (Level 3 = Severe; Level 2 = Major)

Level 3 Deficiencies:	1 Total	1 Number of Inspected Units	100 % of Units	
Level 2 Deficiencies:	0 Total	0 Number of Inspected Units	0 % of Units	
		(units with Level 2 deficiencies, but no Level 3 deficiencies)		

Systemic Deficiencies:

Type	Area	Item	Defect	# w/Defect	#Total	% of Bldgs/ Units w/Defect
Capital*	BldgExt	Foundations	Cracks/Gaps**	2	2	100%
			Spalling/Exposed Rebar**	2	2	100%
Ordinary**	None					

* Capital = repair/replacement requires large cash outlays (roofs, HVACs, appliances).; ** Ordinary = minor repairs

Building Site, Exterior, Systems & Common Areas

Location	Inspected Item	Severity	Observed Deficiency	Ded.
Site	Parking Lots/Driveways/Roads	Level 2	Ponding**	2.02
Site	Parking Lots/Driveways/Roads	Level 3	Potholes/Loose Material**	4.04
Building 5				
Exterior	Fire Escapes	Level 3	Blocked Egress/Ladders	126.65
Exterior	Foundations	Level 2	Cracks/Gaps**	63.32
Exterior	Foundations	Level 2	Spalling/Exposed Rebar**	37.99
Exterior	Roofs	Level 2	Damaged/Clogged Drains**	63.32
Exterior	Roofs	Level 2	Damaged/Torn Membrane/Missing Ballast	63.32
Exterior	Roofs	Level 2	Missing/Damaged Components from Downspout/Gutter**	28.50
Exterior	Roofs	Level 3	Missing/Damaged Shingles**	126.65
Systems	Fire Protection	Level 2	Missing/Damaged/Expired Extinguishers**	88.33
Common Area	Day Care	Level 2	Ceiling - Peeling/Needs Paint**	0.35
Common Area	Day Care	Level 2	Ceiling - Water Stains/Water Damage/Mold/Mildew**	0.88
Common Area	Day Care	Level 2	Doors - Damaged Frames/Threshold/Lintels/Trim**	0.88
Common Area	Day Care	Level 2	Doors - Damaged Surface - Holes/Paint/Rusting/Glass**	1.59
H&S	Emergency/Fire Exits	Level 3	Emergency/Fire Exits Blocked/Unusable	126.65
Building 6				
Exterior	Foundations	Level 2	Cracks/Gaps**	6.33
Exterior	Foundations	Level 2	Spalling/Exposed Rebar**	3.80
Systems	HVAC	Level 2	General Rust/Corrosion	2.21

Note: The Investor Physical Inspection Report was prepared by REAC for use by servicing mortgagees. The design was specified by a working group of active servicing mortgagees and in large part is a reformatting of the existing Inspection Summary Report.

Investor Report	Page 3	FHA Number:	Property Name:	**PARKLANE APARTMENTS**	
Building 6 Common Area		FHEO - Accessible Outside Common Areas**	Level 3	Routes Obstructed or Inaccessible to Wheelchair**	0.00

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